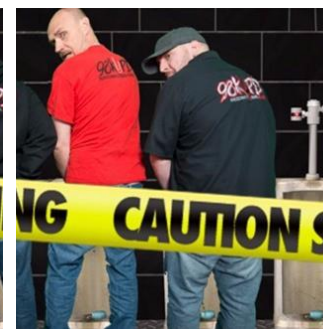


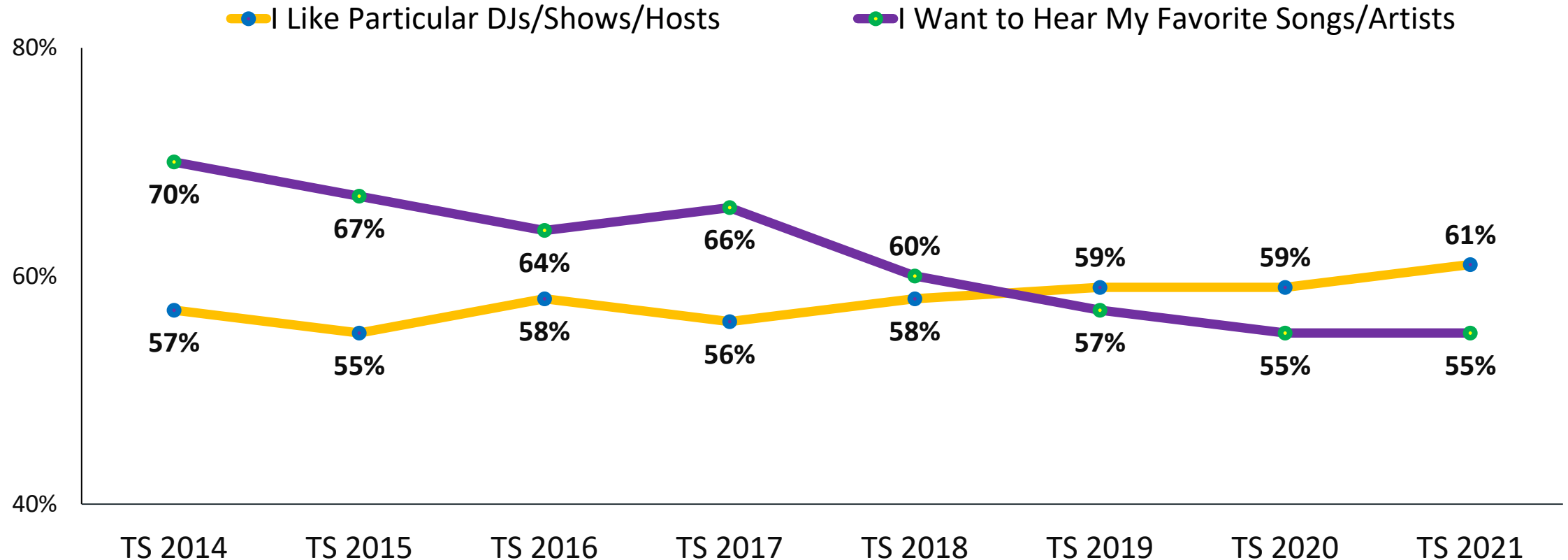
Jacobs  
media strategies



# Radio's Talent During the Year of COVID



# Over Time, the Appeal of Music on the Radio Is Becoming Secondary to the Appeal of Personalities



Among those who listen to AM/FM radio,  
% who say this is a main reason they listen

# Methodology

- N = 536 currently employed talent
  - 510 commercial radio air personalities in the U.S.
  - 26 commercial radio show producers in the U.S.
- N = 65 unemployed commercial radio personalities in the U.S.
- N = 601 total\*
- Interview dates: July 7-19, 2021
- All responses were collected online via the Jockline Daily and Jacobs Media databases - and lots of word of mouth
- The data is unweighted
- This is a web survey and does not represent all radio air talent

\* 1,035 in 2019 and 1,168 in 2018

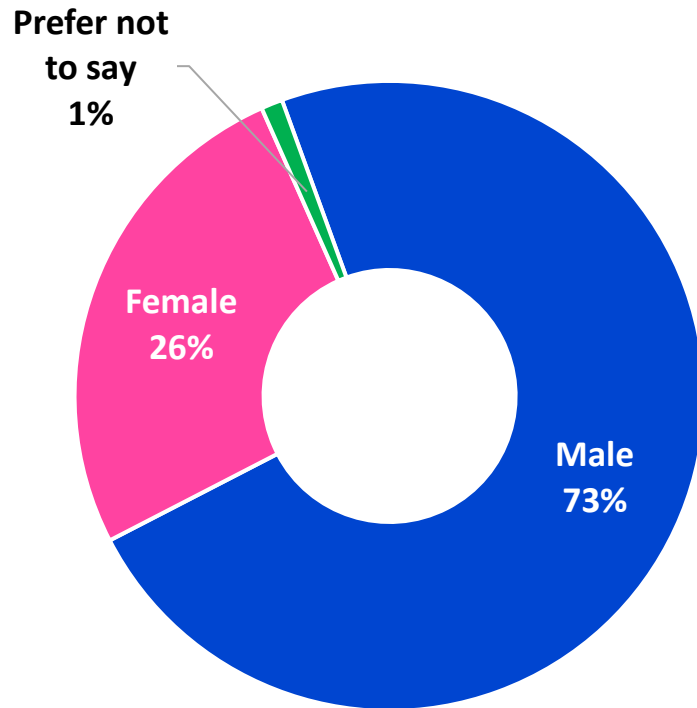




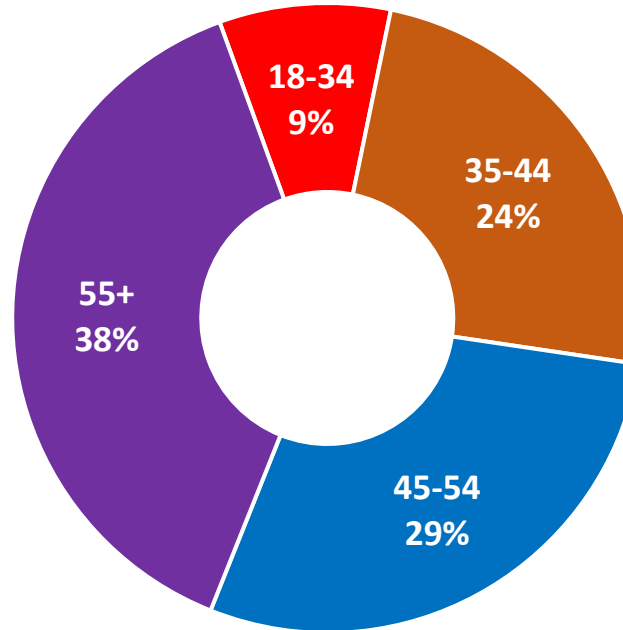
## The Sample (Full/Part Timers)

# Who We Surveyed

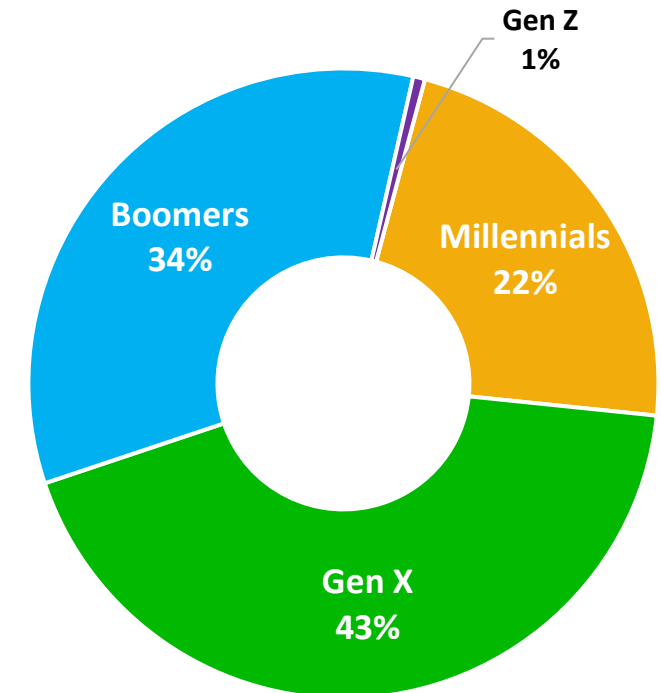
**Gender**



**Age**



**Generation**

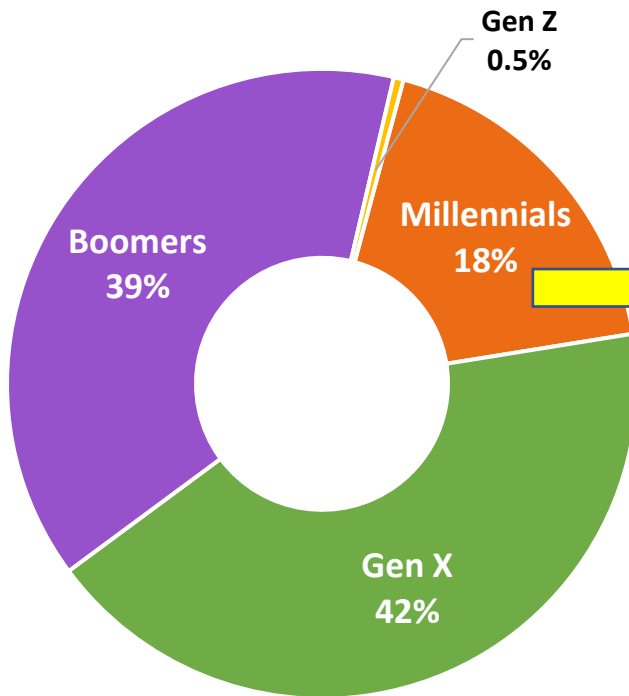


**Average Age: 50.1**

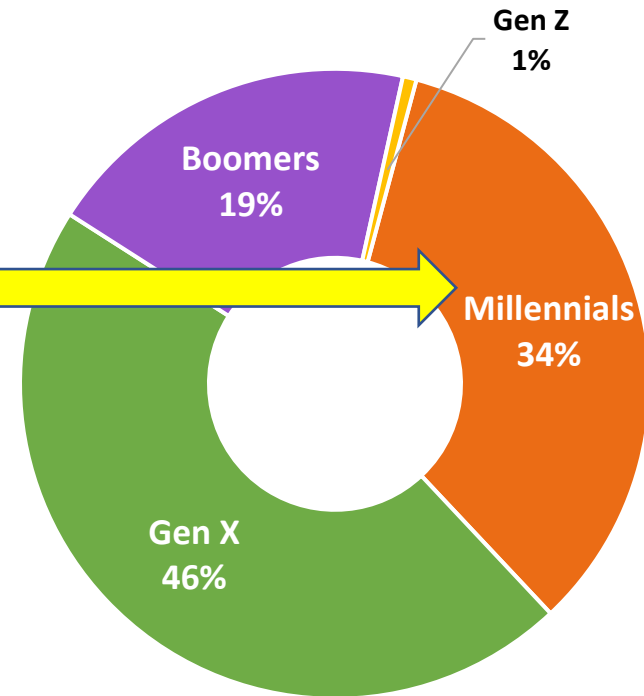
Among On-Air Talent

# Who We Surveyed

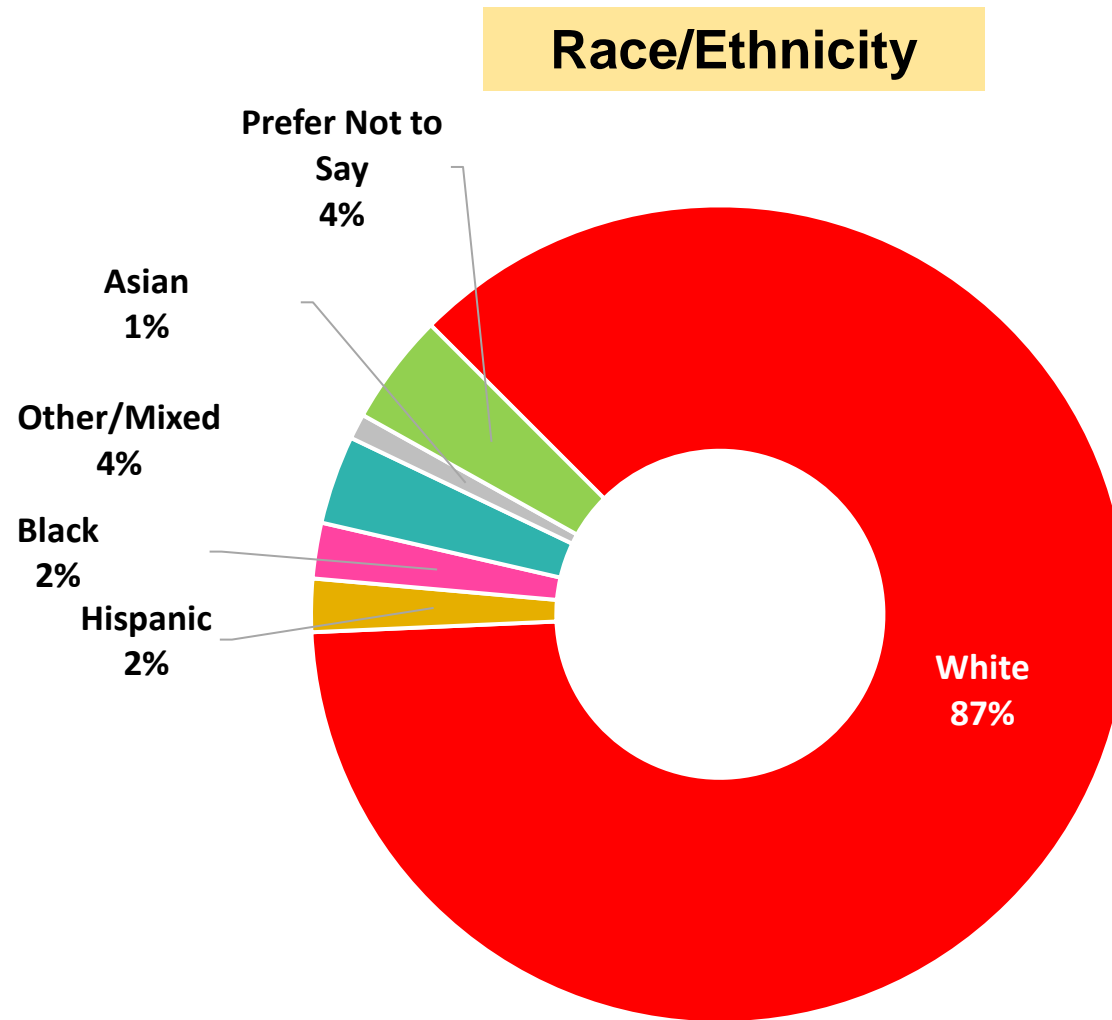
## Generation: Male



## Generation: Female



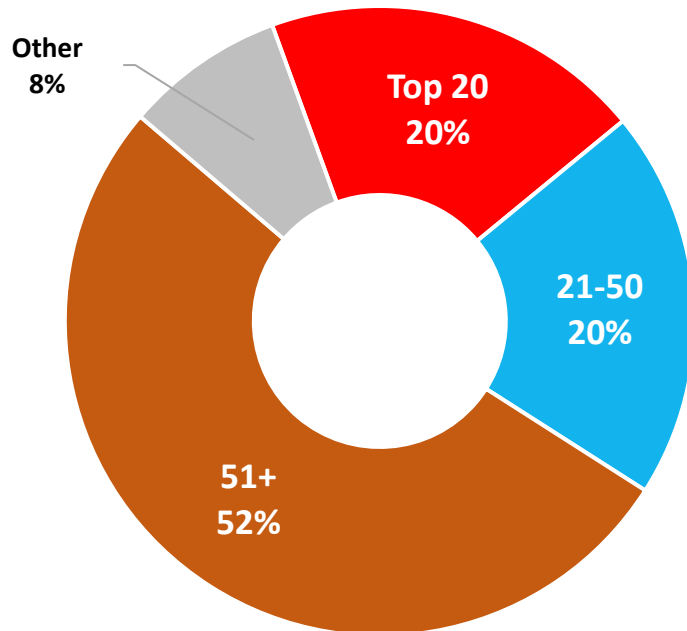
# Who We Surveyed



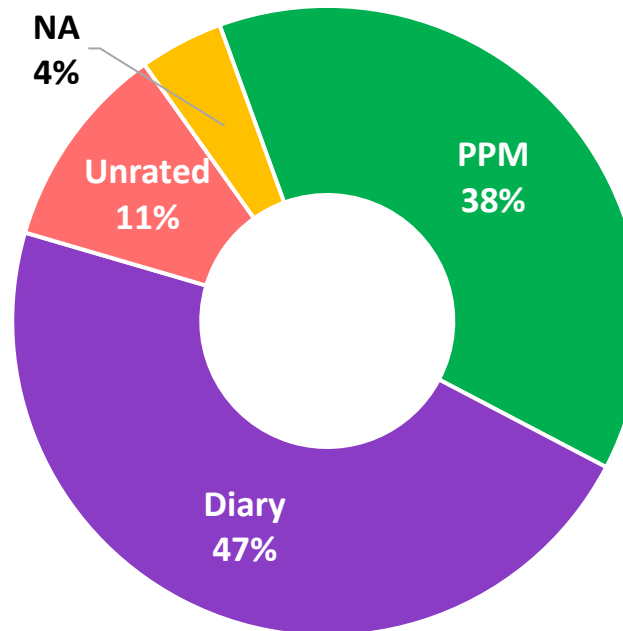
Among On-Air Talent

# Who We Surveyed

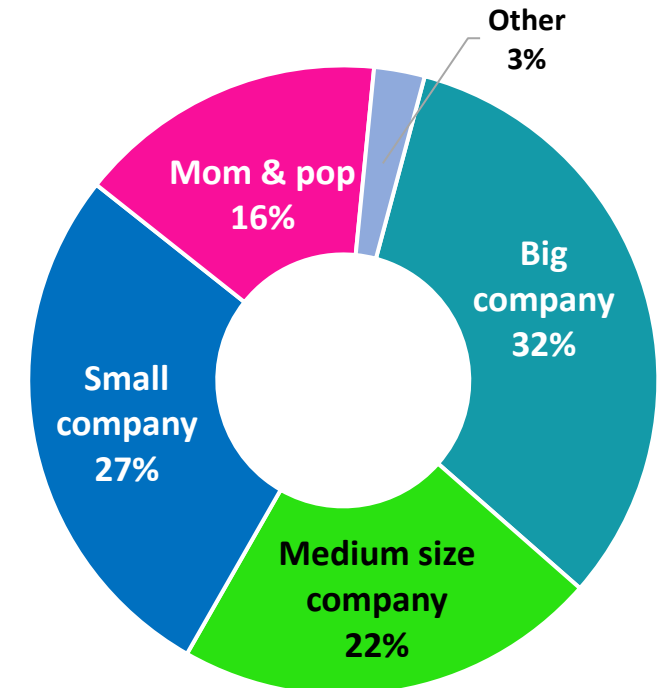
## Market Size



## Ratings Methodology



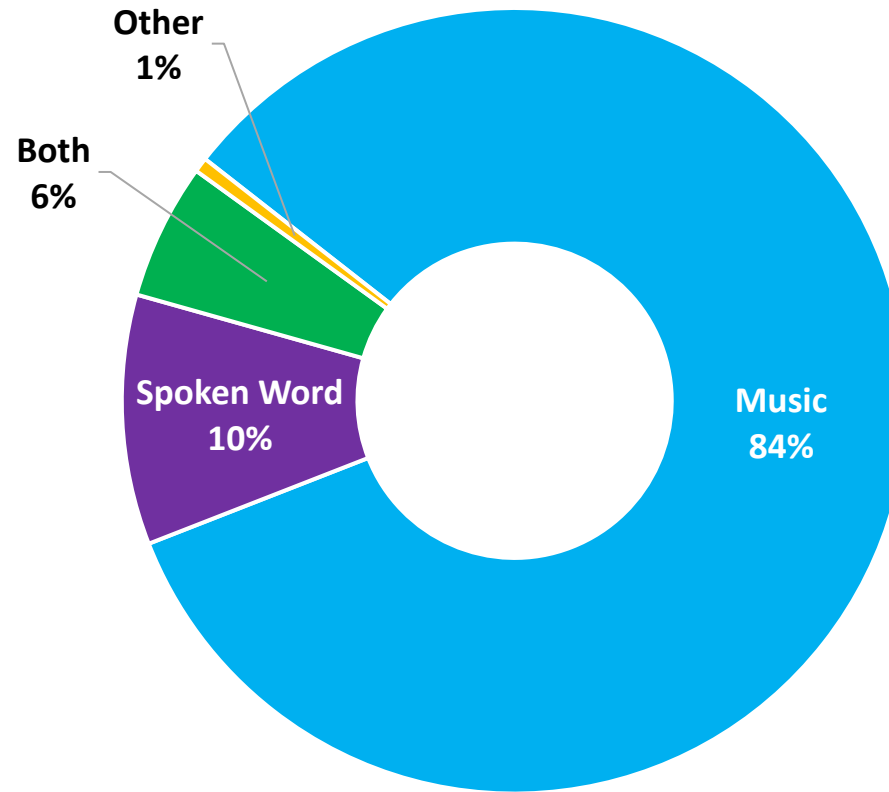
## Ownership





# Who We Surveyed

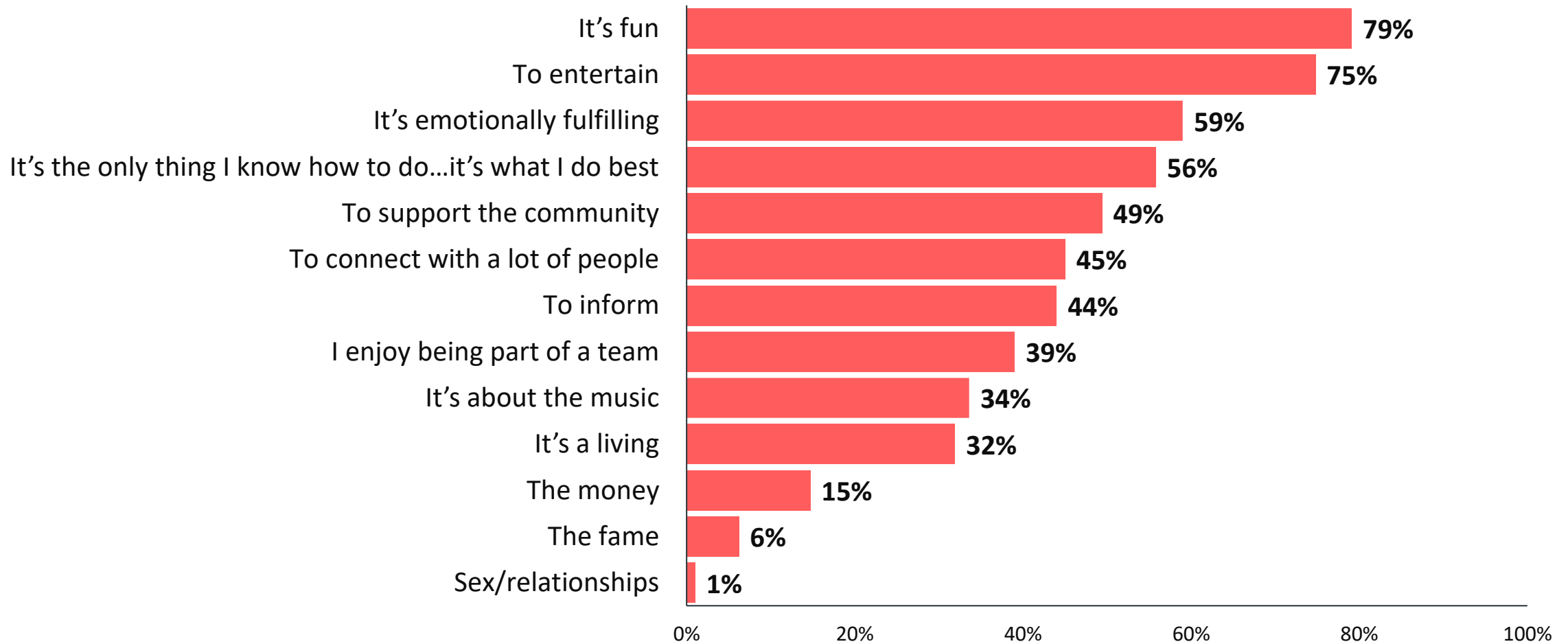
## Station Format



Among On-Air Talent



# Why Go On-Air? It's Fun, to Entertain, Emotionally Fulfilling



Among On-Air Talent, % who say this is a main reason they are on the radio

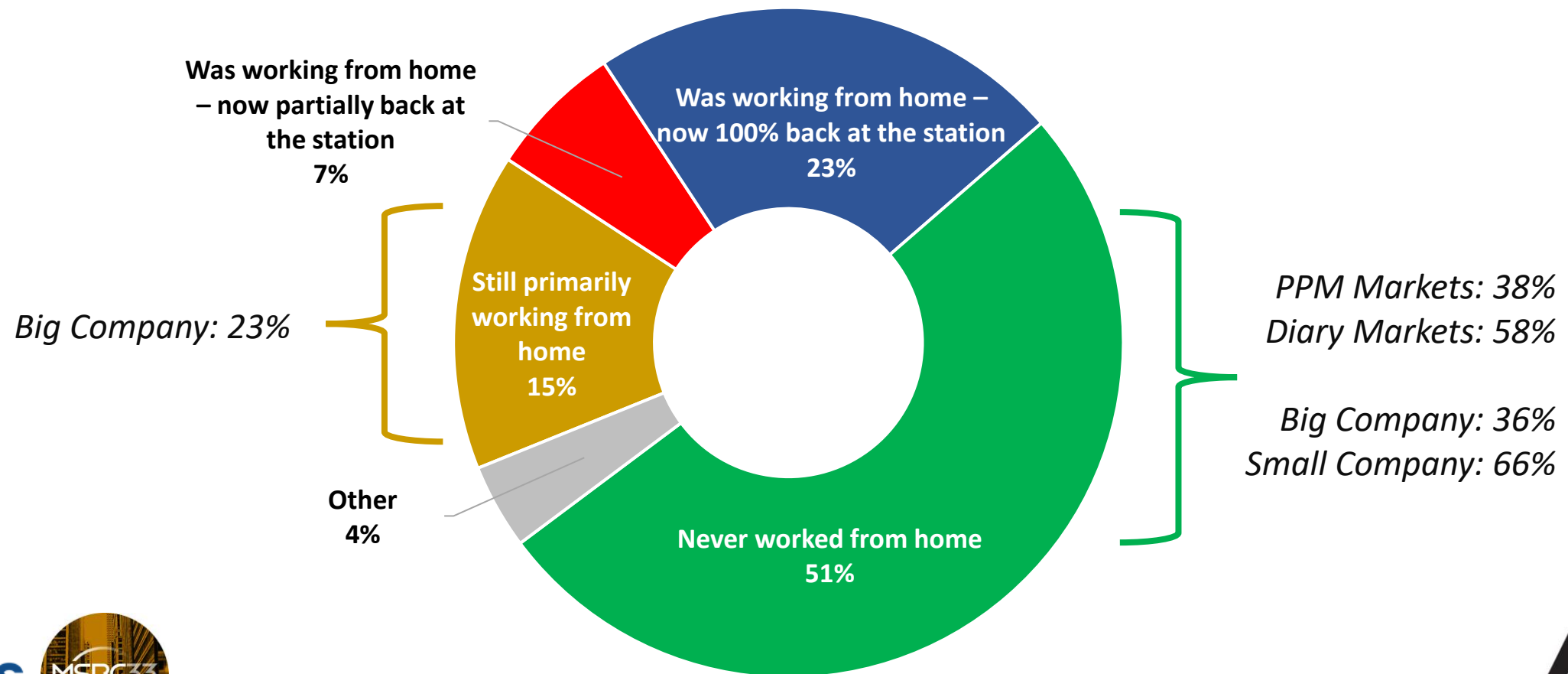






# Most Never Worked From Home or Are Back at the Station

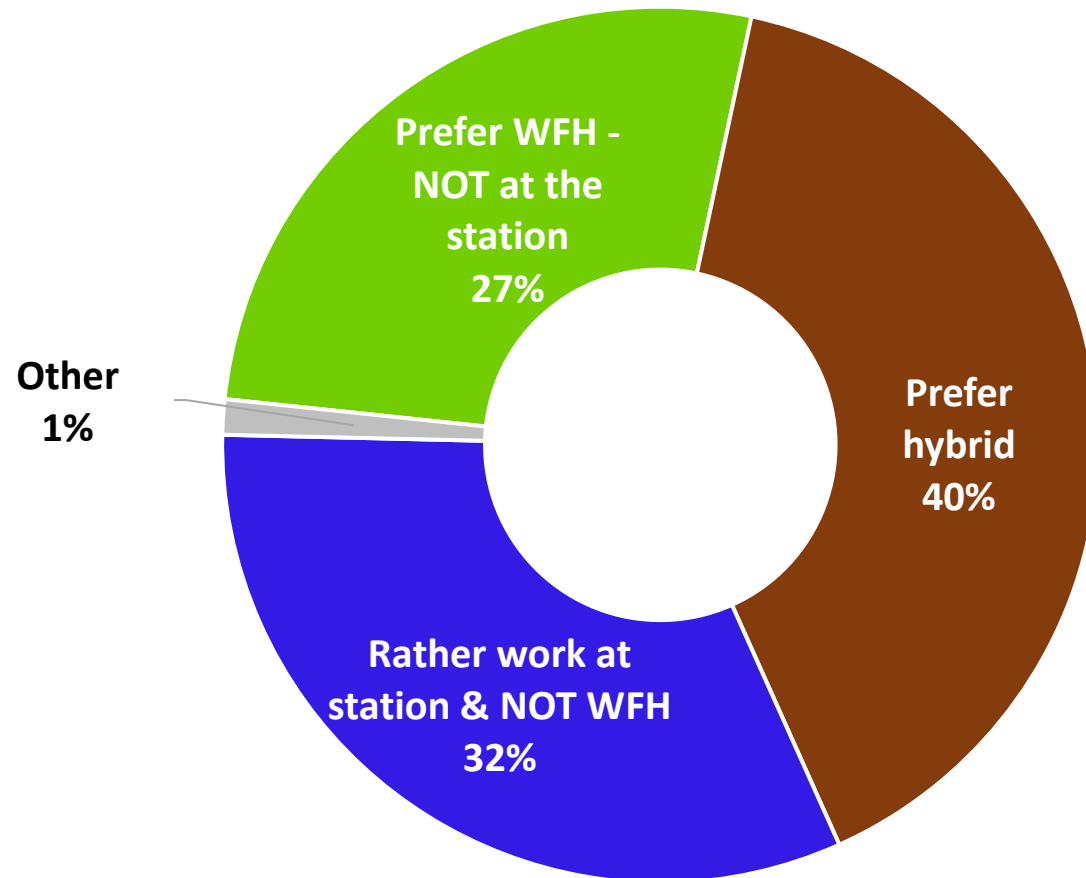
*“Which of these best describes your work situation?”*



Among On-Air Talent

# Among Talent Who Have Worked From Home Since COVID, Most Prefer to Spend Some Time at the Station

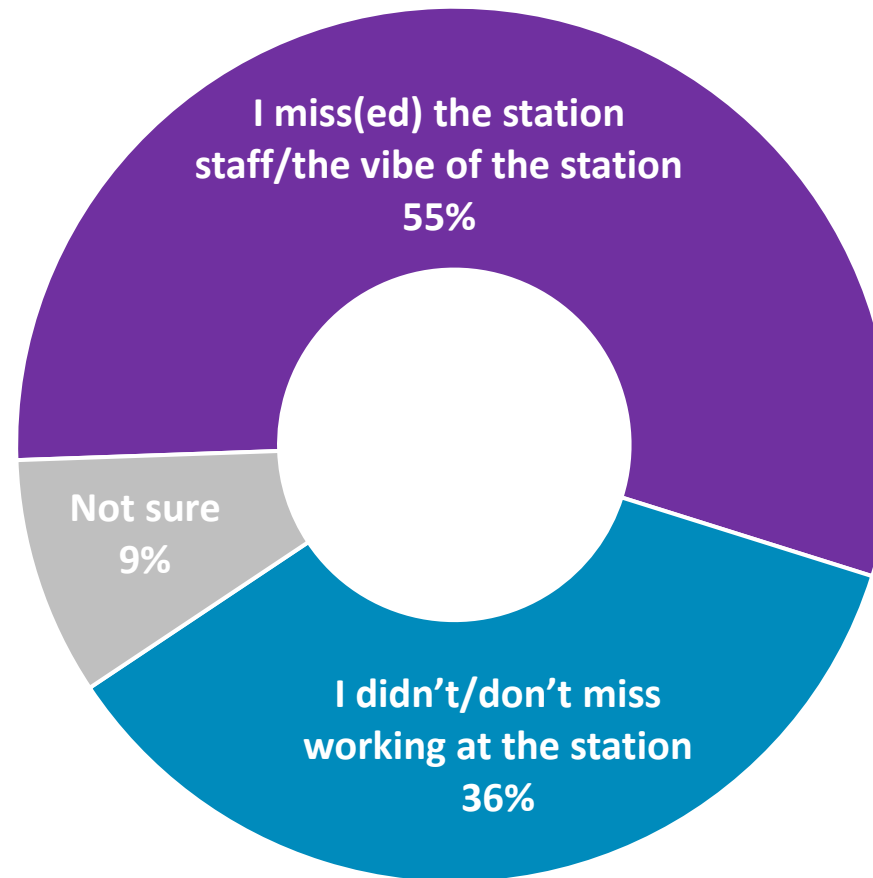
*“Which of these statements below best describes how you feel about working from home?”*



Among On-Air Talent who has worked from home at least some since COVID

# A Majority of Those Who Work/Worked From Home Miss the Staff/Vibe of the Station

*“Now that you’ve spent time working from home, which of these statements below best describes your current feelings?”*





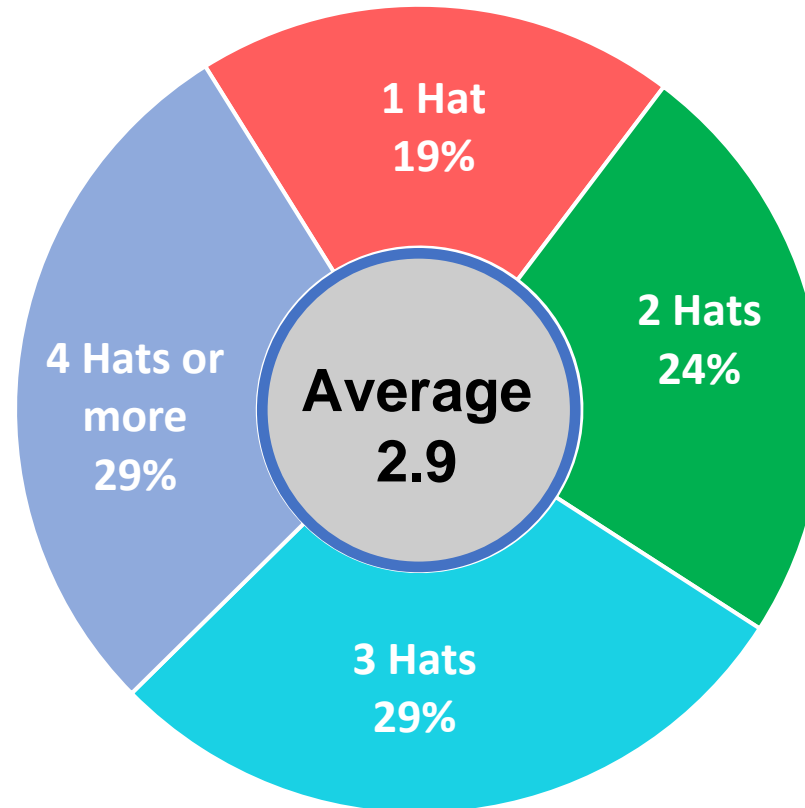




# The Average Radio Personality Wears Nearly Three “Hats” and Nearly Three in Ten Currently Wear Four or More “Hats”

*“Many radio personalities have more than one job. For example, you may be the program director and on the air – or you may be on the air for more than one station in the cluster or company – or in addition to being on the air, you may be the music director, the promotion director, etc.*

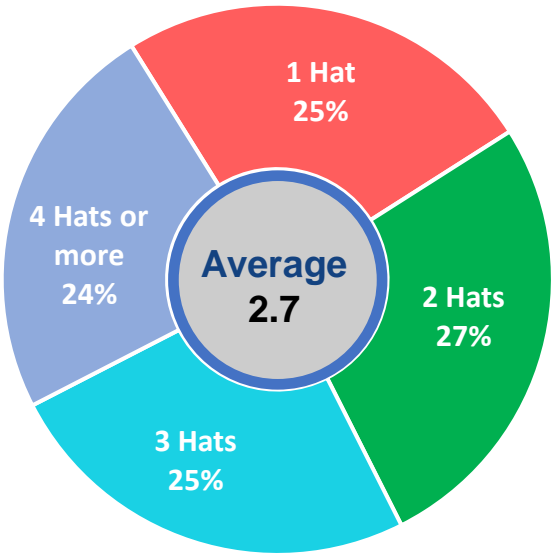
*Add up your current roles – how many ‘hats’ are you now wearing?”*



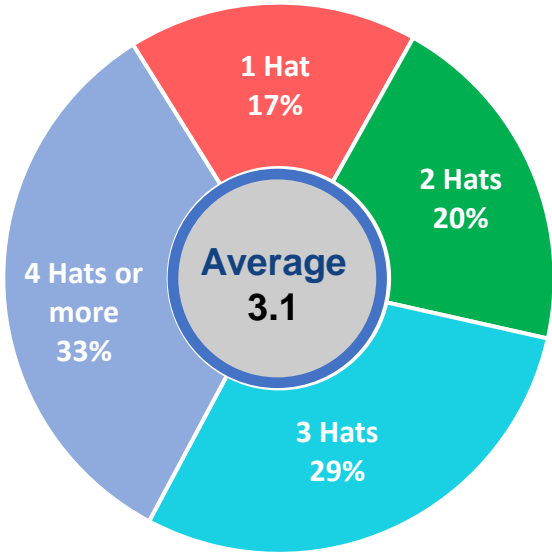
Among On-Air Talent

# The Smaller the Company, the More “Hats” Are Worn by Talent

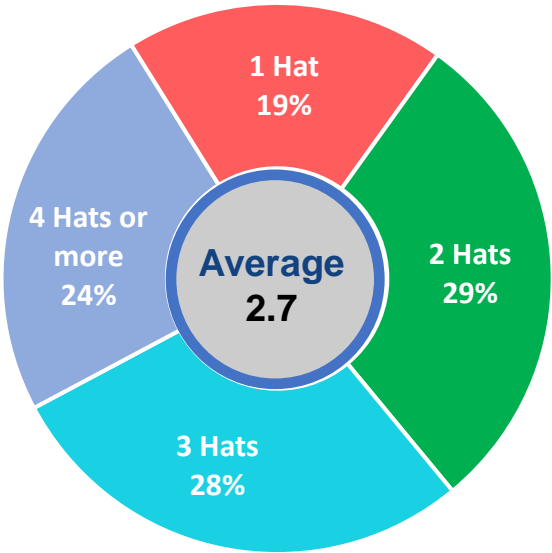
A big company



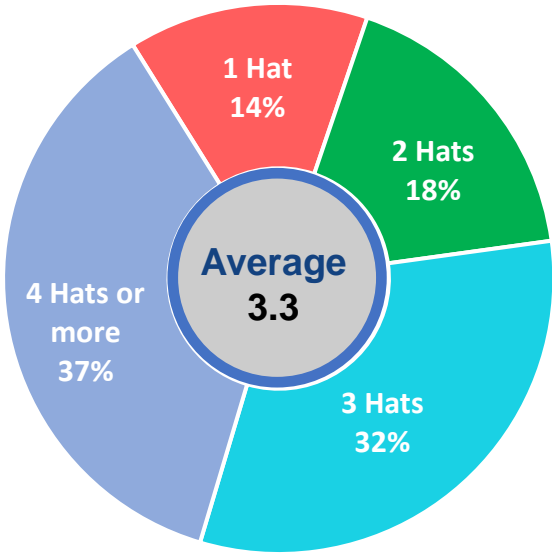
A small company



A medium company

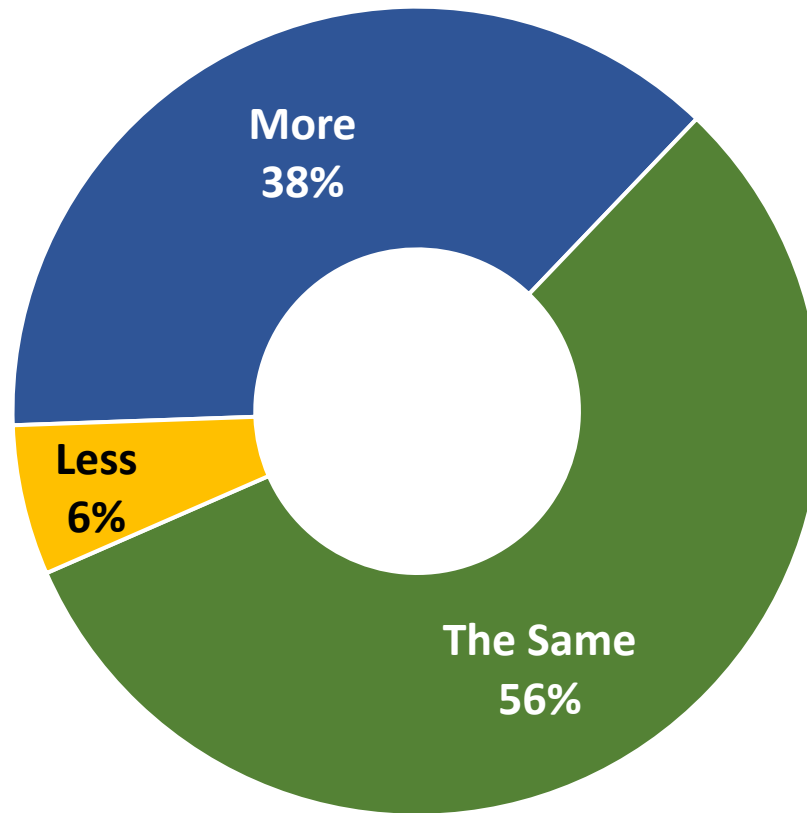


A “mom & pop”



# Nearly Four in Ten Have Added Job Responsibilities Since COVID Began

*"Today, are you wearing more 'hats,' less 'hats,' or the same number of 'hats' as you were wearing pre-COVID?"*



Among On-Air Talent

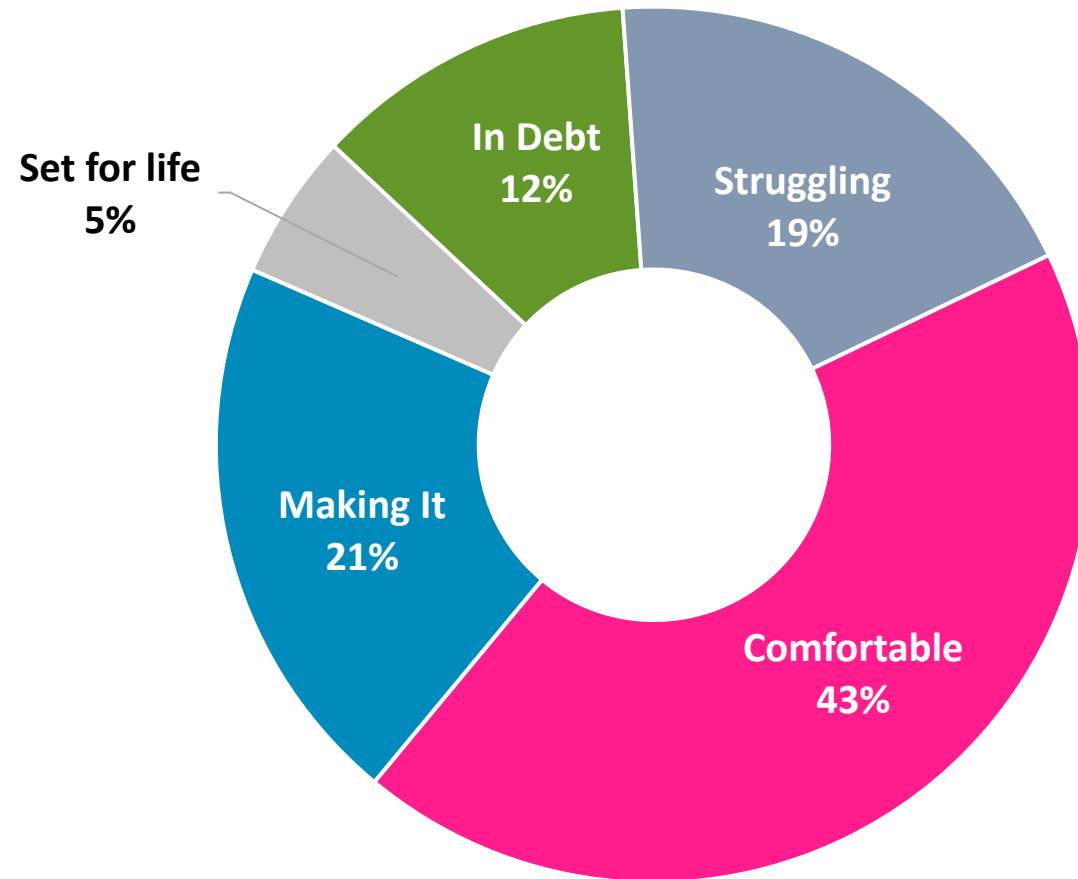






# A Majority Are “Making It” or Are Comfortable Financially, But Three in Ten Say They Are In Debt or Struggling

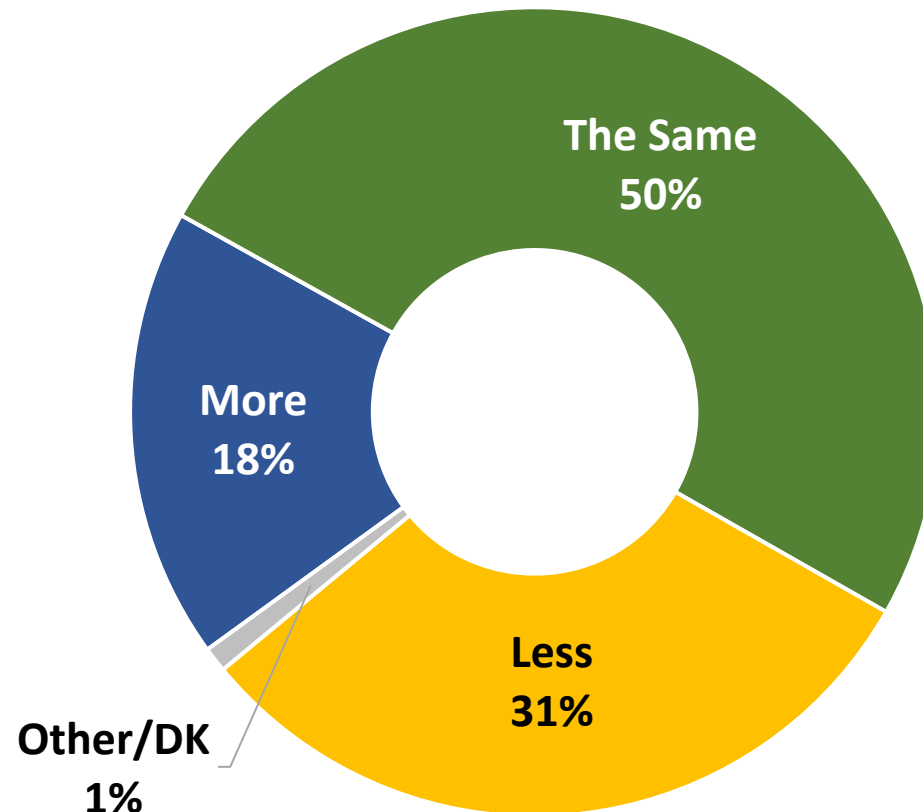
*“Financially, are you...”*



Among On-Air Talent

# Three in Ten Are Making Less Money Since COVID

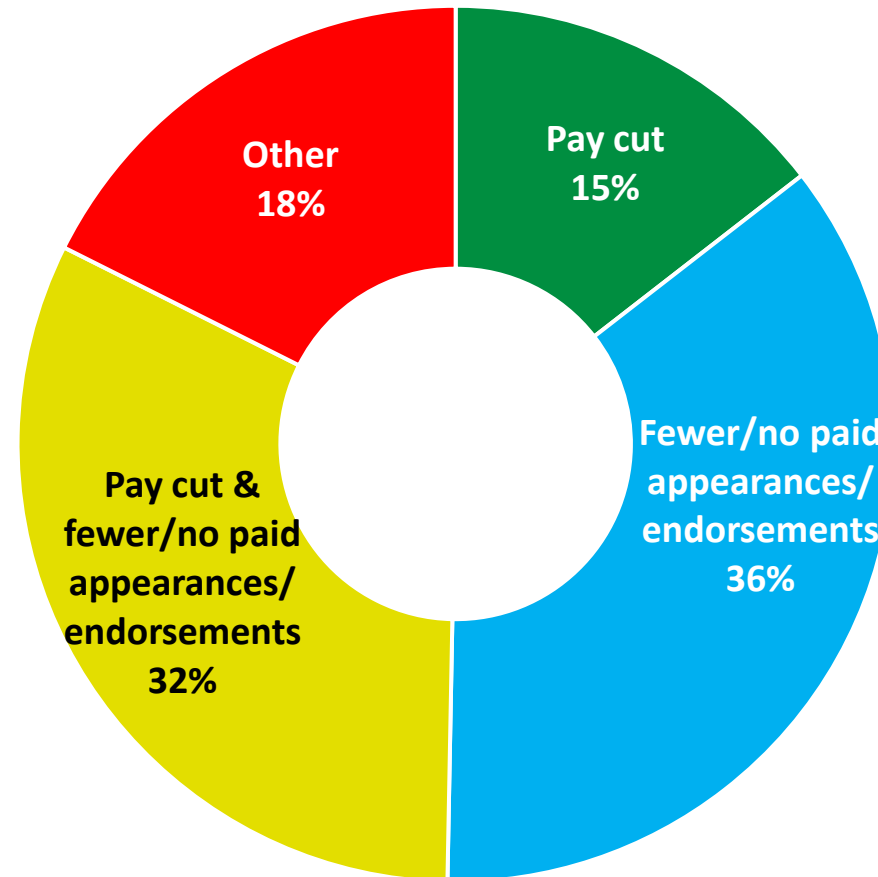
*“Regarding your overall compensation from all radio-related sources (salary, bonuses, appearances, etc.), how much money are you making now from your radio job compared to what you made in 2019 (pre-COVID)?”*



Among On-Air Talent

# Among Those Making Less Money, Two in Three Point to Fewer (or No) Appearances/Endorsements

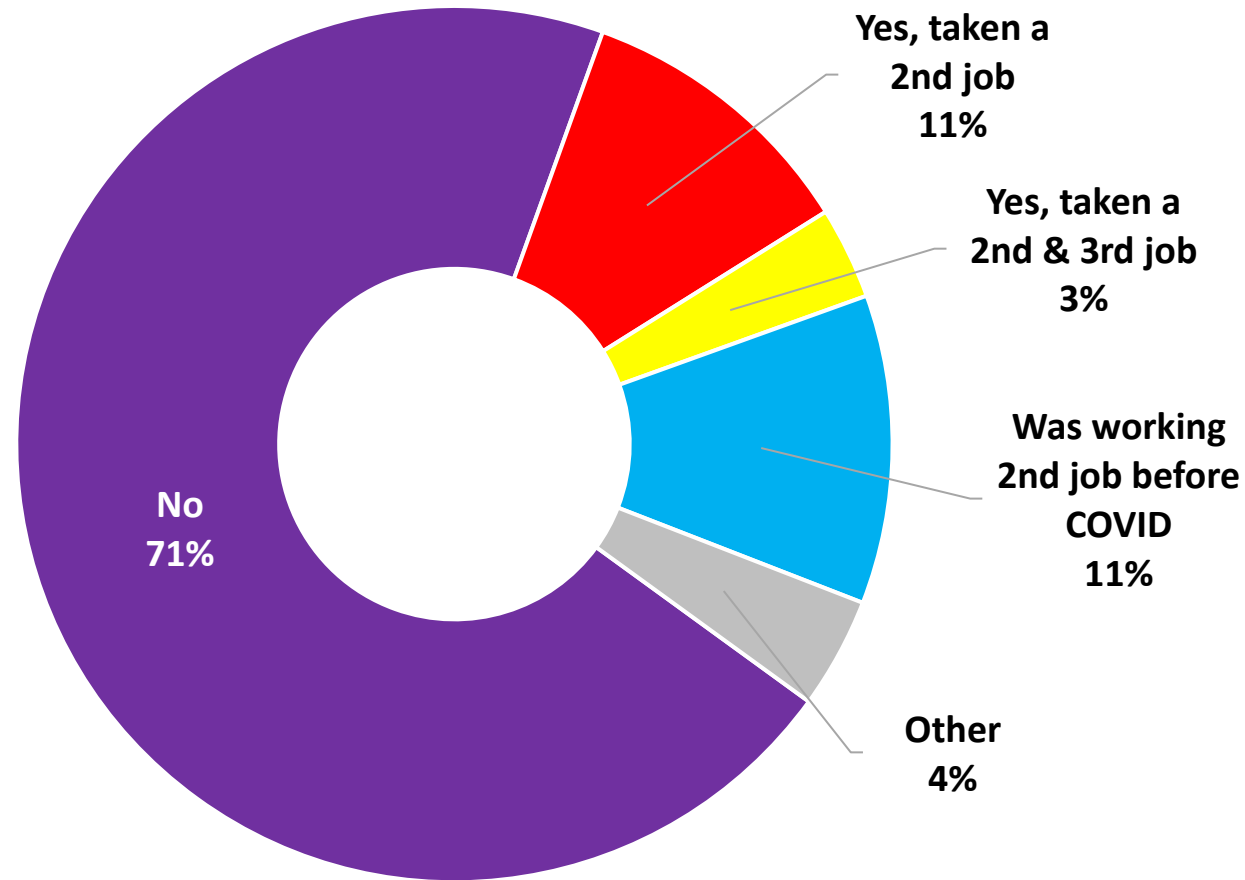
*“What is the MAIN reason why you’re making less money now?”*



Among On-Air Talent Reporting Less Overall Compensation Since COVID

# One in Four Has Taken a Second Job (or Third Job), With COVID Being the Main (But Not the Only) Driver

*“Have you had to take a second (or third) job in order to meet your financial needs since the onset of COVID?”*



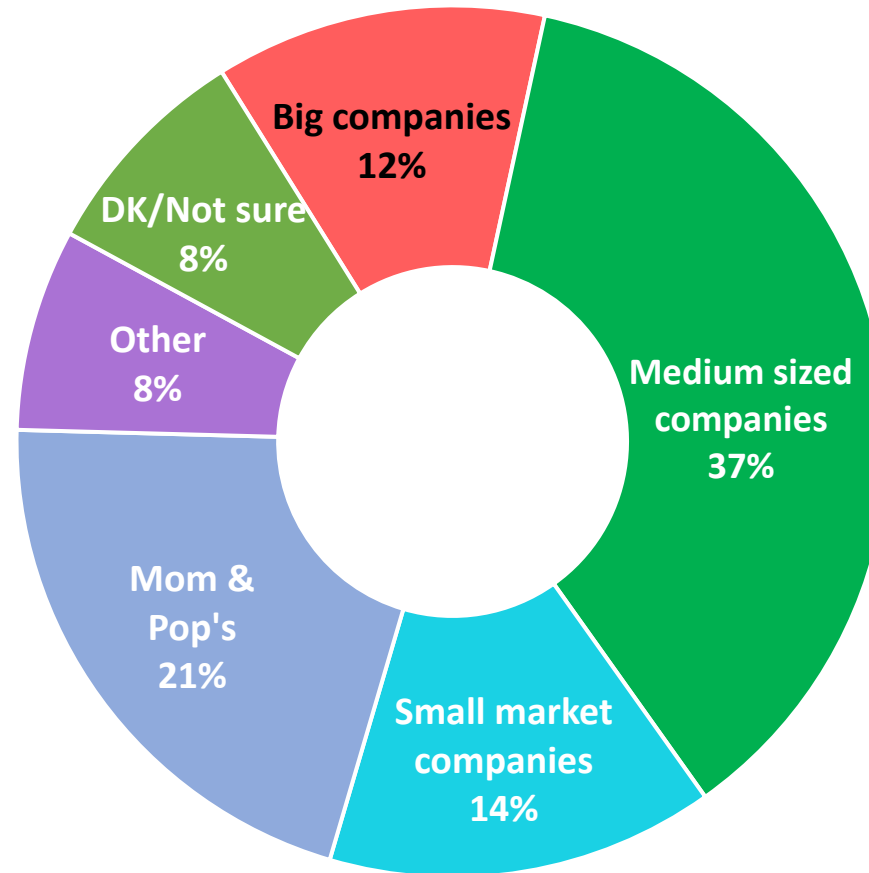
Among On-Air Talent





# Medium Sized Broadcast Companies Are Most Desirable

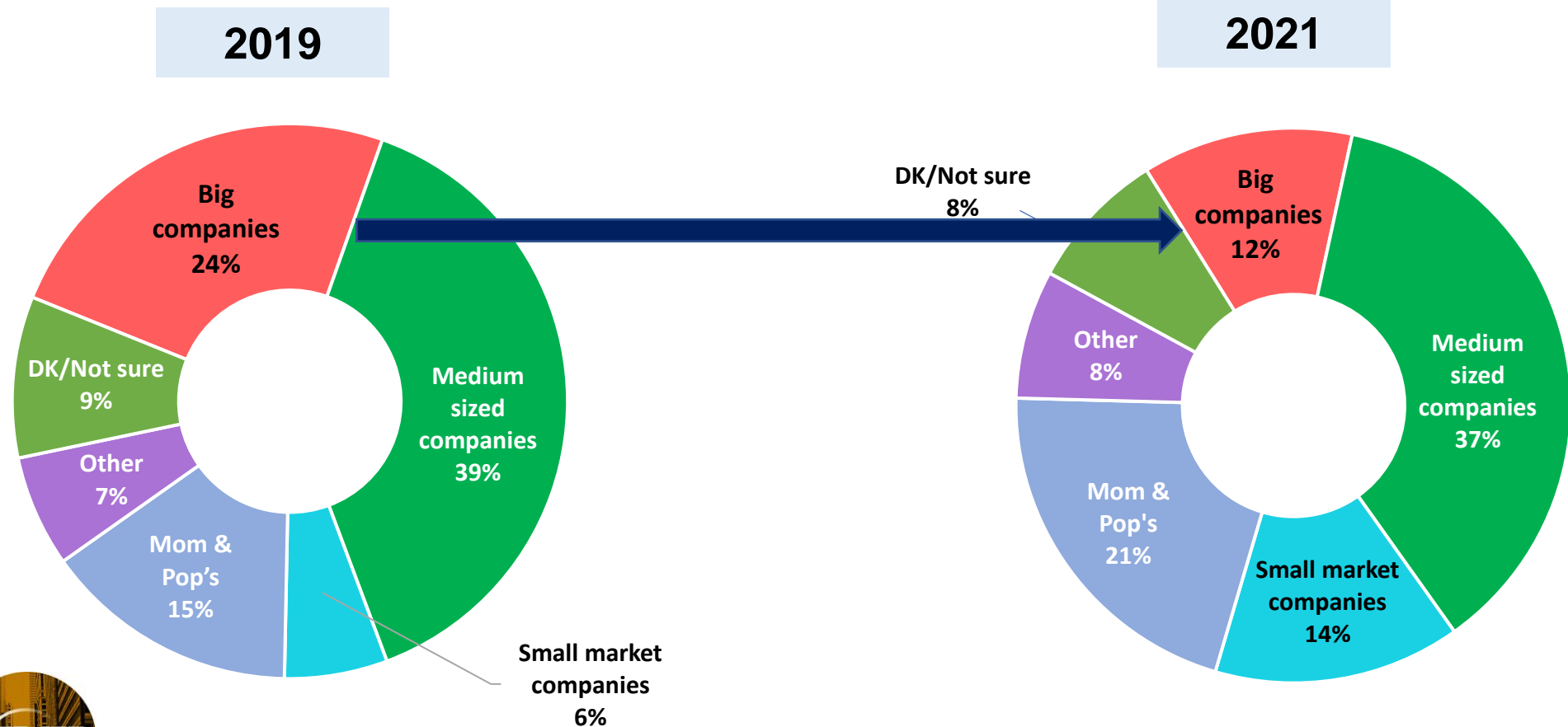
*“Knowing what you know now, if you were just starting out in the radio business, the type of company you would most like to work for is...”*



Among On-Air Talent

# The Big Companies Are Losing Desirability while Medium Companies Dominate, and Smaller Companies Are on the Rise

*“Knowing what you know now, if you were just starting out in the radio business, the type of company you would most like to work for is...”*





# NET PROMOTER



*Not at all likely*

*Neutral*

*Extremely likely*



Detractor

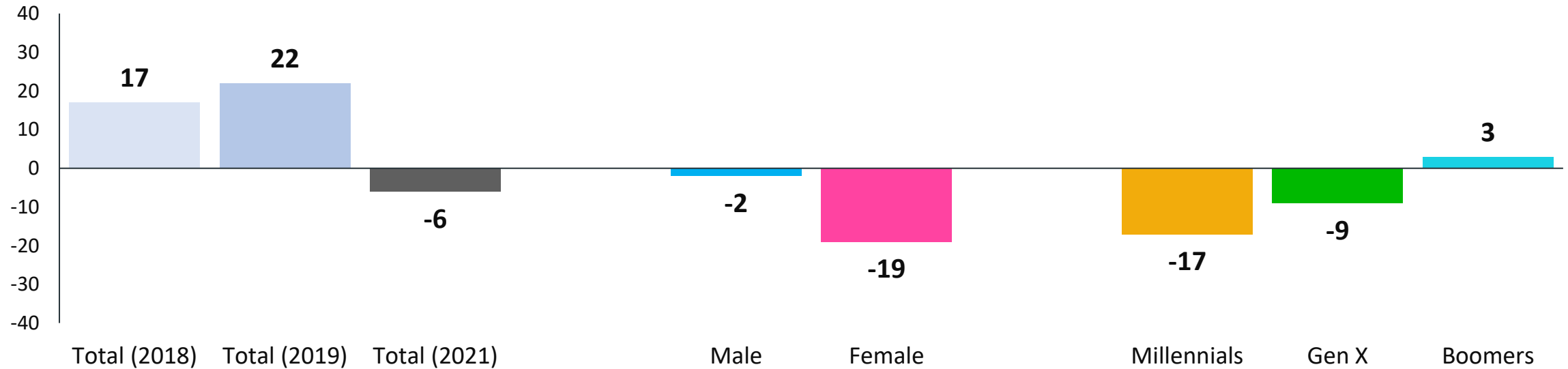
Passive

Promoter

**% PROMOTERS - % DETRACTORS = NPS (NET PROMOTER SCORE)**

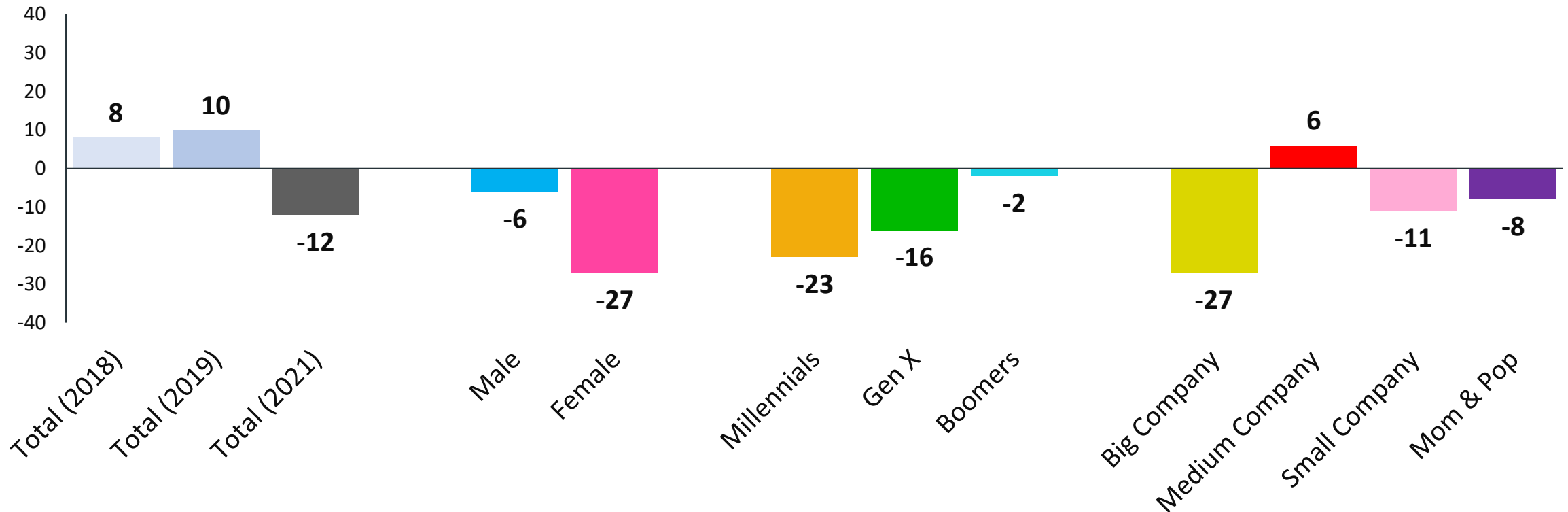
# NPS Scores for the Station of Employ Have Plummeted Since COVID

NPS: Station You Primarily Work For (As a Station to Work At)



# NPS Scores for Radio Companies Have Steeply Declined Since COVID, Especially the Biggest Corporations

NPS: Company That Owns Your Station (As a Company to Work For)









*“Broadcast radio in the U.S. is being challenged on many competitive fronts. If you could have face time with your owner or CEO (without fear of punishment or retribution), what would you tell them?”*

*“Broadcast radio in the U.S. is being challenged on many competitive fronts. If you could have face time with your owner or CEO (without fear of punishment or retribution), what would you tell them?”*

- *“I would tell them their digital goals for air personalities are too aggressive. We are now "content contributors" who have an air shift. This is not what I signed up for in 1979, but I understand why they need to do this.”* (Boomer Male, Medium Company, Music Station, Market Size Unknown)
- *“Markets should be self contained. Cookie-cutter programming strategies don't work! All market managers and GMs should have significant time logged as a programmer/air talent. Sales teams should be trained on programming strategies and the creative process to write better copy and have a greater understanding of how brands are programmed for success. Air talent should be trained on the sales process.”* (Gen X Male, Small Company, Music/Spoken Word Station, Market 1-20)
- *“To stop treating talent as expendable, interchangeable pieces. Local is more than just knowing what's going on in the area. It's being part of the area. It used to be that you aspired to work your way up the market chain (small->medium->large->major) and learning as you go. Now it doesn't matter because developing talent isn't a concern because it all is centralized. One jock, multiple markets, multiple stations.”* (Gen X Male, Large Company, Spoken Word Station, Market 21-50)
- *“You need to invest in current and future talent because they ARE the station.”* (Gen X Female, Large Company, Music/Spoken Word Station, Market 1-20)



*“Broadcast radio in the U.S. is being challenged on many competitive fronts. If you could have face time with your owner or CEO (without fear of punishment or retribution), what would you tell them?”*

- *“Things were going so well the first year or so after #Metoo and now it's like it never happened. The pay for women? I'm so sick of being the winningest PD in my region and I'm still paid less than the men I regularly beat AND they think I don't know.”* (Gen X Female, Medium Company, Music Station, Market 51+)
- *“There are a lot of things, but I'll focus on investment, innovation and listening. We need to invest in the future. Invest in talent development, in luring top talent away from other industries such as big tech. Invest in marketing our stations! When was the last time radio really spent money marketing radio? Invest and focus on innovation. Again, when was the last time radio was really innovative? I would also tell them to LISTEN to little guys. Listen to what the people on the front lines are telling you and experiencing and then actually ACT on what they're saying. I could go on and on, lol.”* (Gen X Male, Medium Company, Music Station, Market 51+)
- *“I would say to give local markets autonomy. A one-size-fits-all approach does not apply to radio. I would also add, ‘stop trying to be something you're not.’ People come to radio for companionship and connection, and we are not delivering on either of these fronts.”* (Millennial Female, Large Company, Music Station, Market 51+)
- *“We need more bodies, and we need new equipment.”* (Gen X Male, Mom & Pop, Music Station, Market 51+)

*“Broadcast radio in the U.S. is being challenged on many competitive fronts. If you could have face time with your owner or CEO (without fear of punishment or retribution), what would you tell them?”*

- *“Please fire all the old men in charge who say ‘...but that's how we've always done things.’” (Millennial Male, Company Size Unknown, Music Station, Market 1-20)*
- *“The broadcast towers are less valuable every day, concentrate your resources on content and content creators that focus primarily on the audience, not the medium.” (Gen X Male, Medium Company, Music Station, Market 51+)*
- *“Things are not the same when I first started and that is good, change is sometimes good, but this working from home has got to change. It seems like people have gotten lazier and more sloppy in their work ethic.” (Boomer Male, Mom & Pop, Music Station, Market 51+)*
- *“We have scattered our attention across the digital landscape to the detriment of the on-air product. First let's do great radio, then let's create the digital that supports it, not the other way around.” (Gen X Male, Medium Company, Music Station, Market 51+)*
- *“Radio is all about the listener! Period. It starts and ends right there and everything you do on air and in the community should always be about that and not ‘your’ wants. Take care of those who spend their time listening to your station and the rest of it falls into place and everyone wins!” (Boomer Male, Mom & Pop, Music Station, Market 51+)*

*“Broadcast radio in the U.S. is being challenged on many competitive fronts. If you could have face time with your owner or CEO (without fear of punishment or retribution), what would you tell them?”*

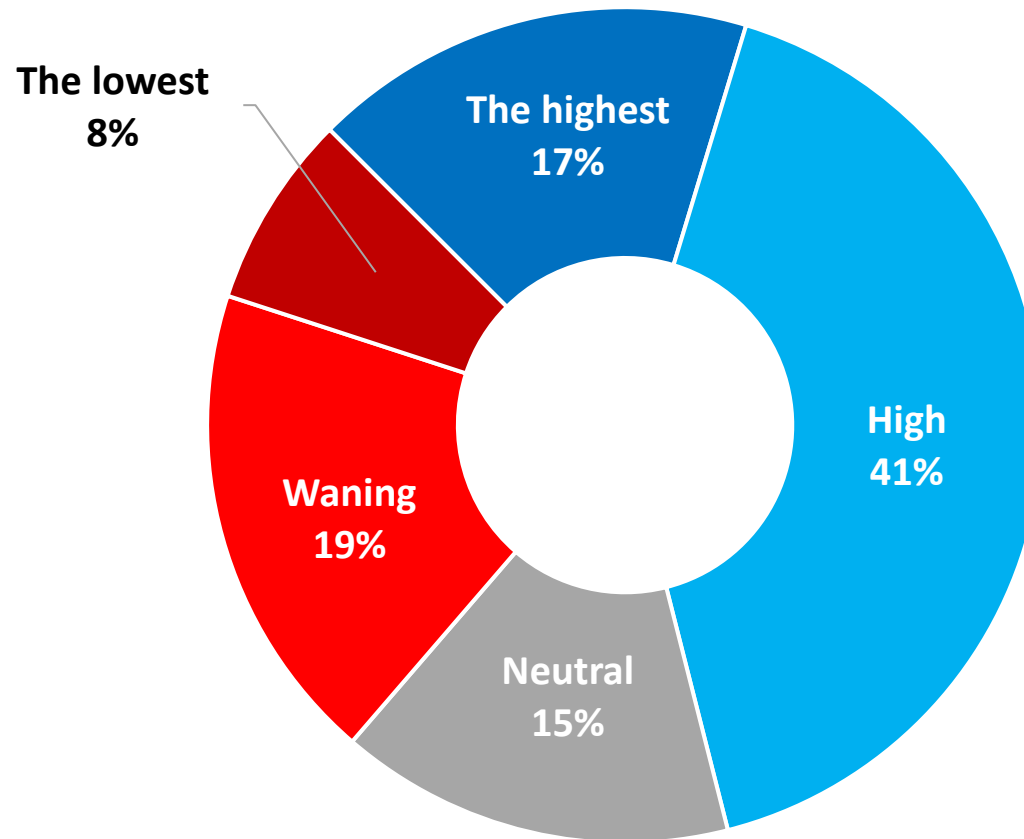
- *“My concern isn't competitive as much as it is the growing political and social pressures on free speech. Will management/corporate begin ‘de-platforming’ shows off the air that are at times ‘edgy,’ too conservative, or not PC, the way Facebook, Twitter, and others have done to conservative viewpoints in social media? It is of great concern among others I know in radio but are not talking about it publicly. The consensus of thought is management will only address it when they feel pressure to face it rather than have a policy already in place and defend their position.”* (Boomer Male, Medium Company, Spoken Word Station, Market 1-20)
- *“Let us work from home.”* (Boomer Female, Large Company, Music Station, Market 1-20)
- *“We need to be appreciated and we need at least a cost of living raise. Living check to check sucks.”* (Gen X Male, Small Company, Music Station, Market 21-50)
- *“Do a better job at protecting women from predatory men and female bosses who are unchecked bullies.”* (Gen X Female, Large Company, Spoken Word Station, Market 1-20)
- *“Please be open to new ideas.”* (Boomer Male, Mom & Pop, Spoken Word Station, Market 51+)
- *“Come see us sometime.”* (Gen X Male, Small Company, Music Station, Market 51+)





# Nearly Six in Ten Are Passionate About Radio, But More Than One in Four Says Their Passion is Low or Waning...

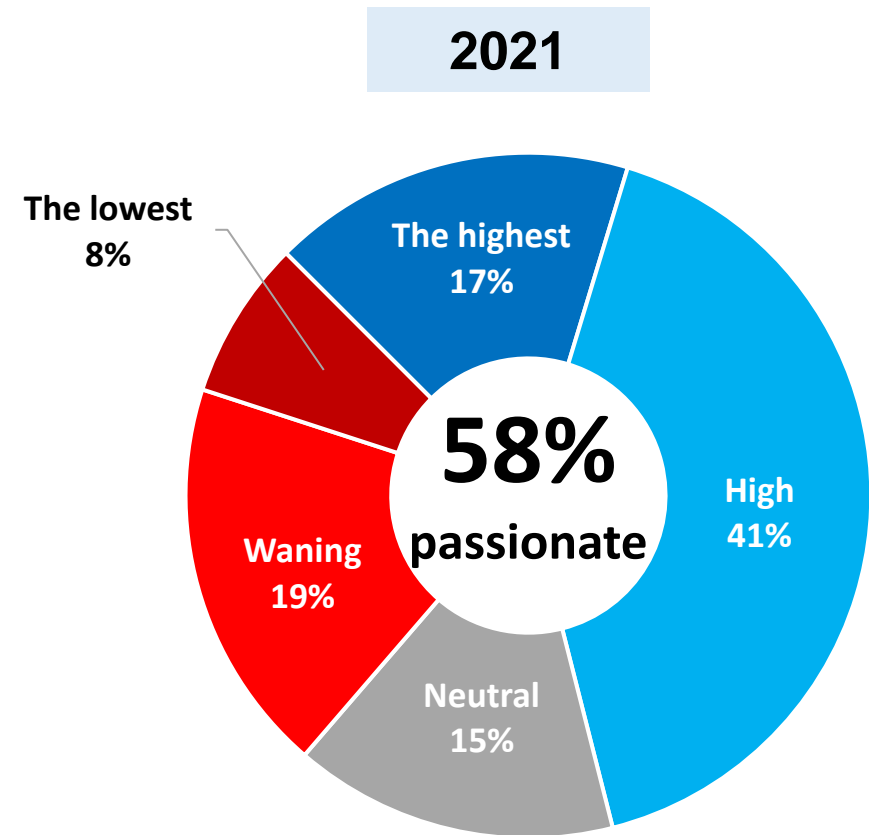
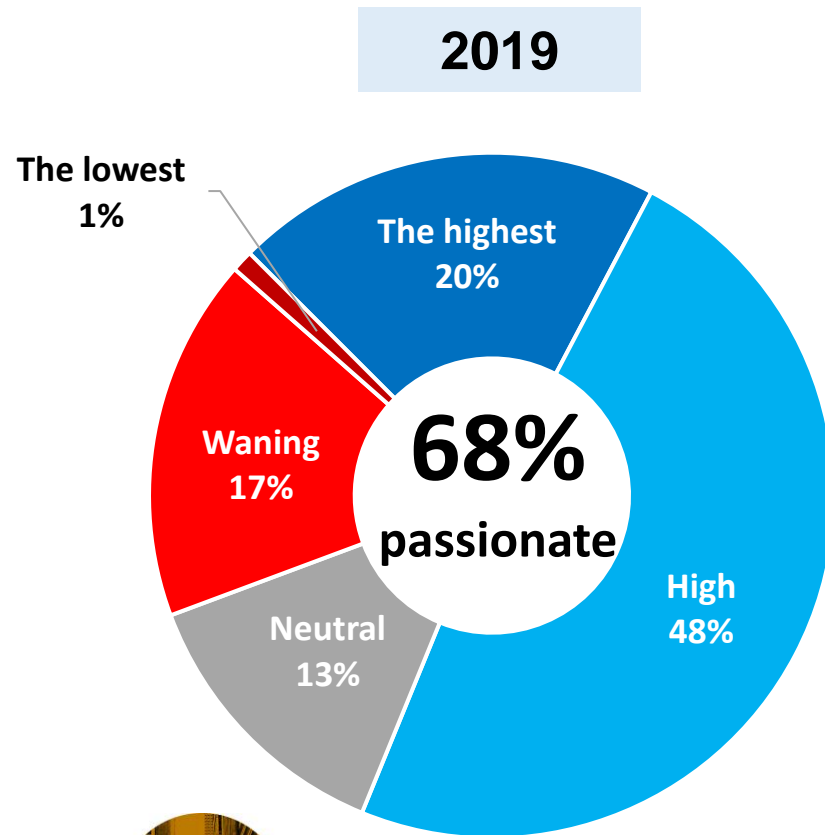
*"Your current passion level for the broadcast radio business is..."*



Among On-Air Talent

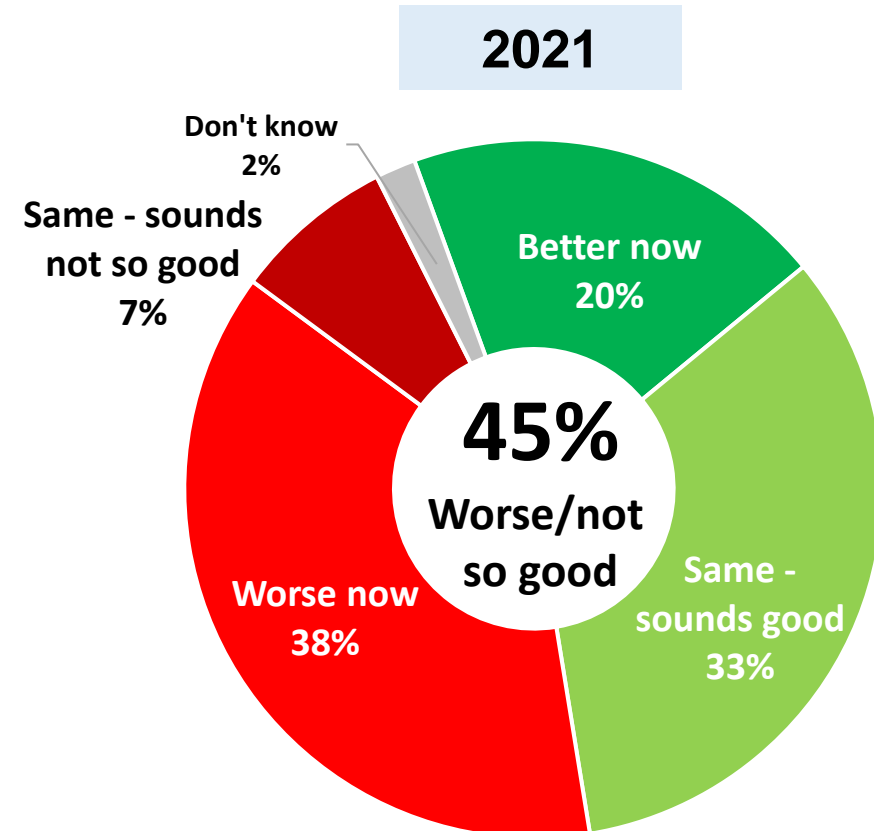
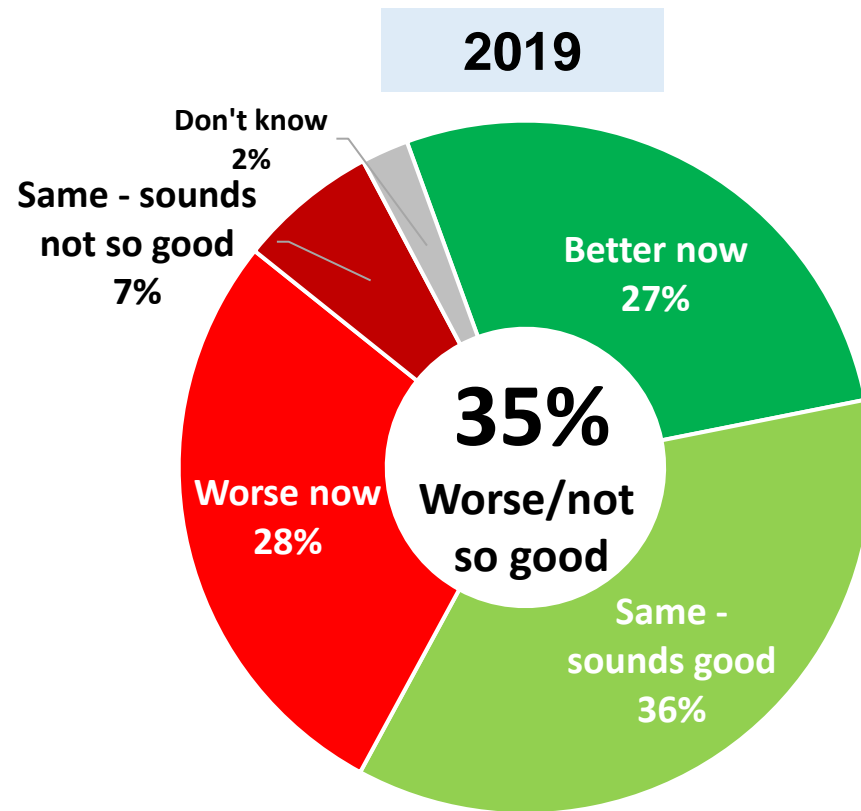
# ...And Their Passion for Radio Has Declined Since 2019

*"Your current passion level for the broadcast radio business is..."*





# While Most Talent Say Radio Sounds Good, Those Who Say It's Now Worse/Not So Good Is Higher Than Pre-COVID

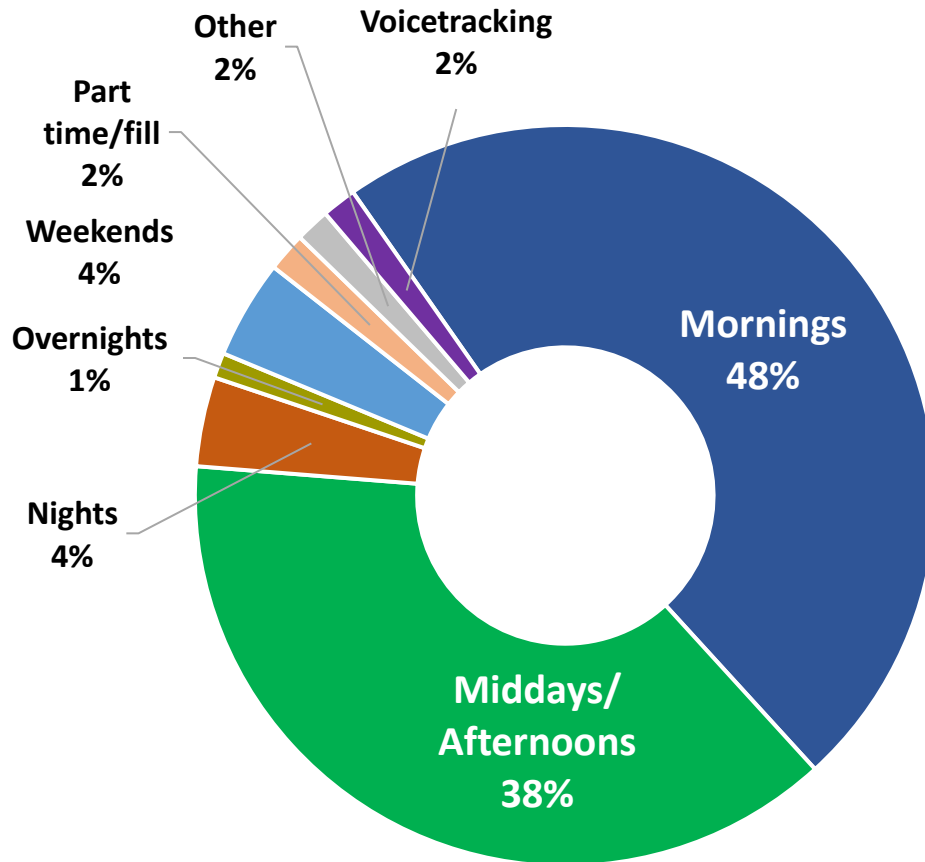


*"Compared to the past couple years, would you say the overall sound of the AM/FM radio you hear (generally at your station, in your company, in your local market) is:"*

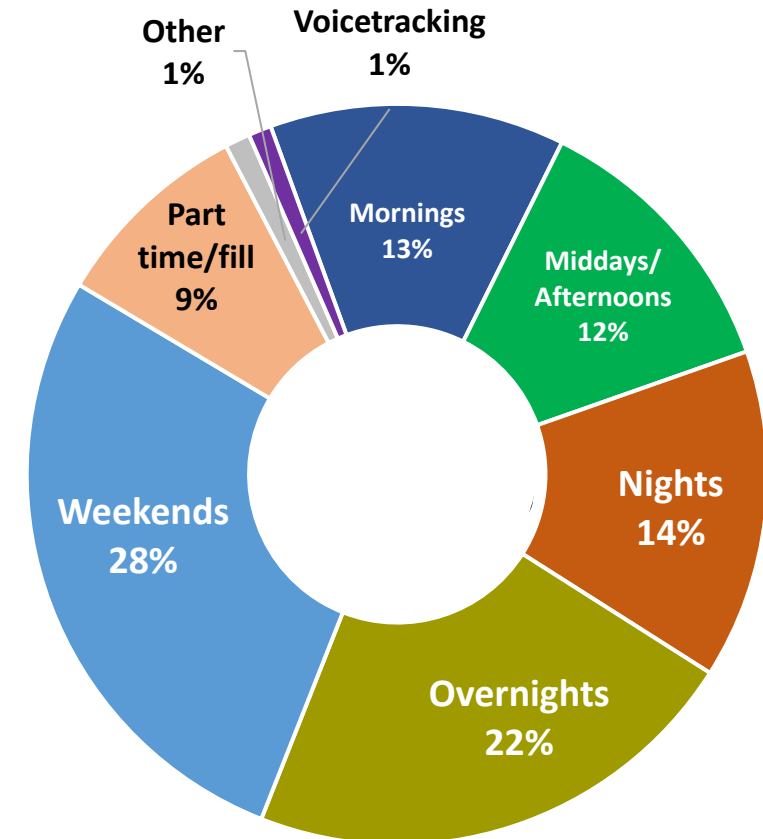
Among On-Air Talent

# The Importance of Airshifts to Nurture New Talent

**Current Airshift**

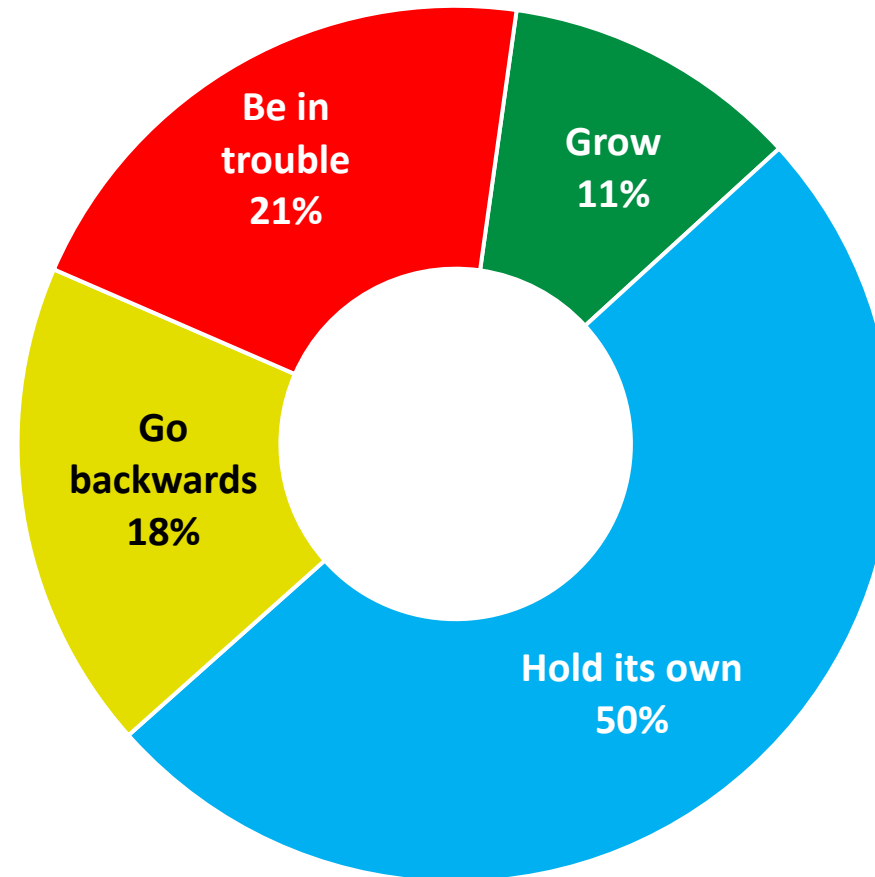


**First Airshift**



# While a Majority Feel Broadcast Radio Will Be in Pretty Good Shape Over the Next 5 Years...

*"In the next 5 years, you think broadcast radio will:"*

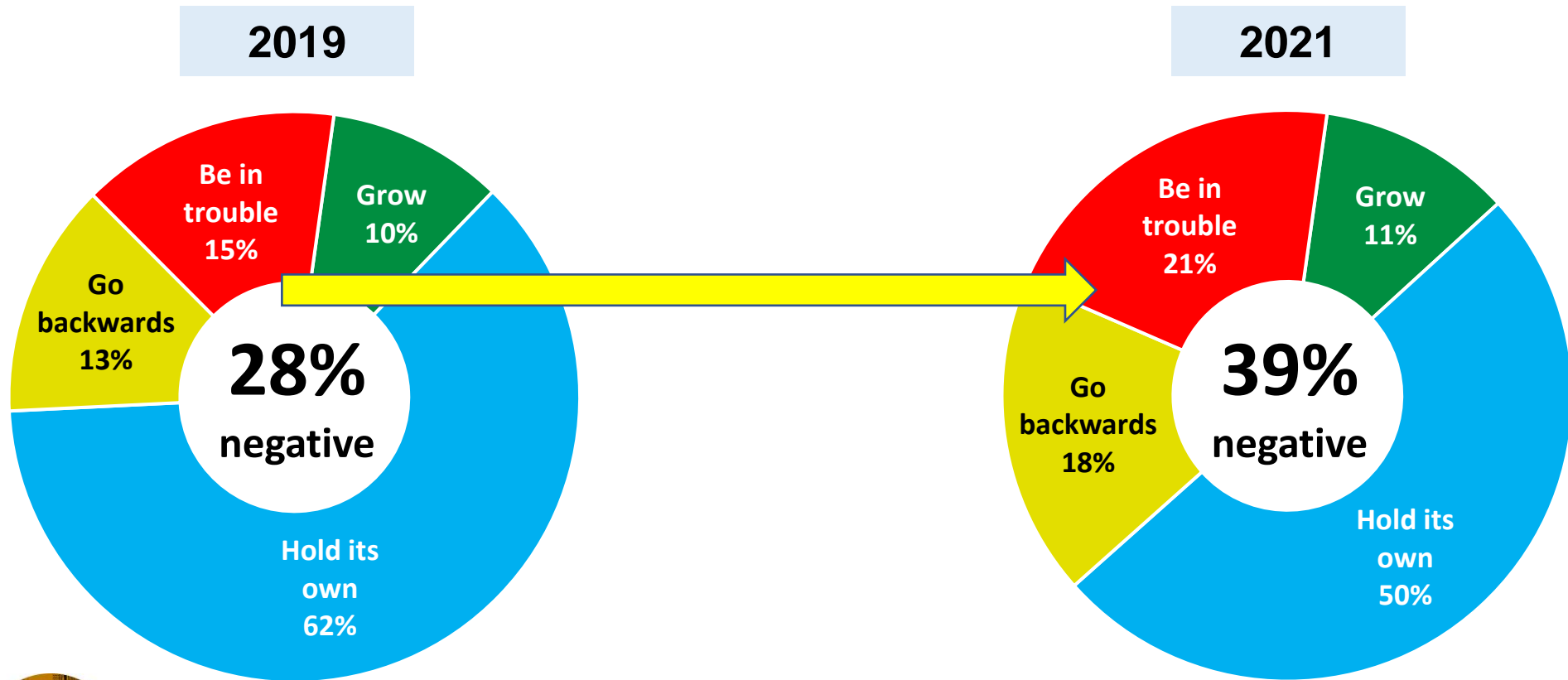


Among On-Air Talent



# ...There Is Growing Concern About Broadcast Radio's Future

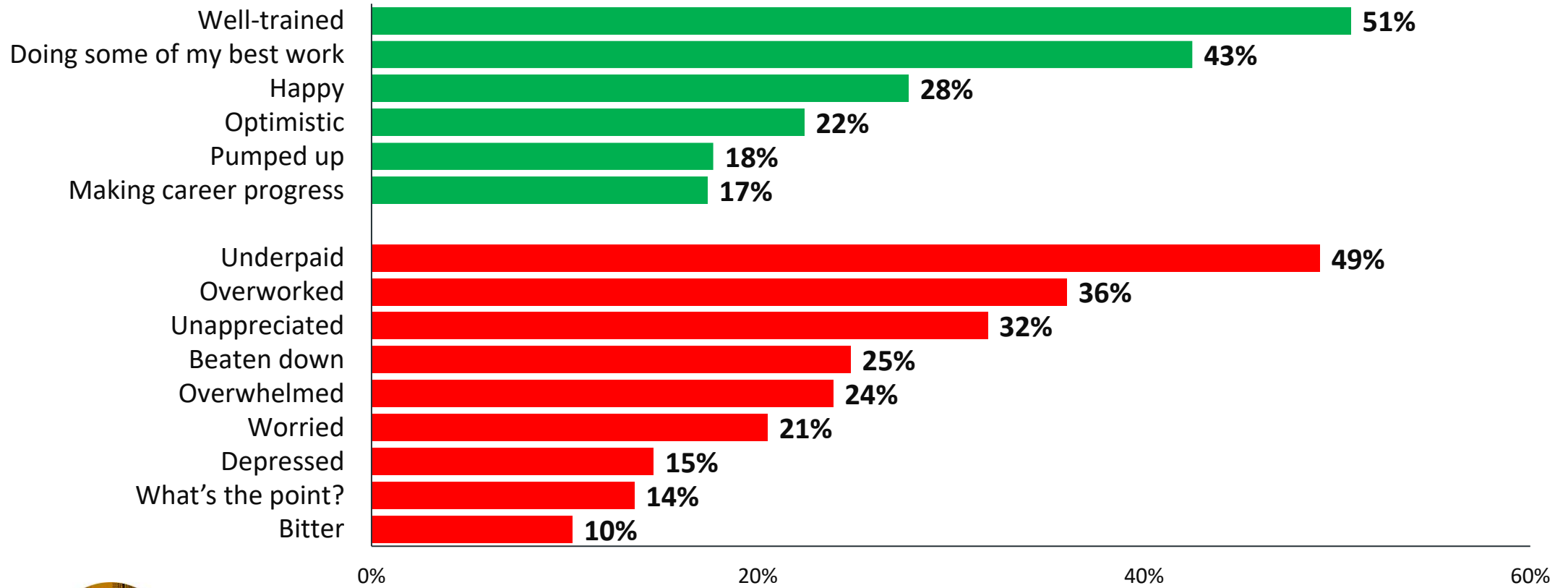
*"In the next 5 years, you think broadcast radio will:"*





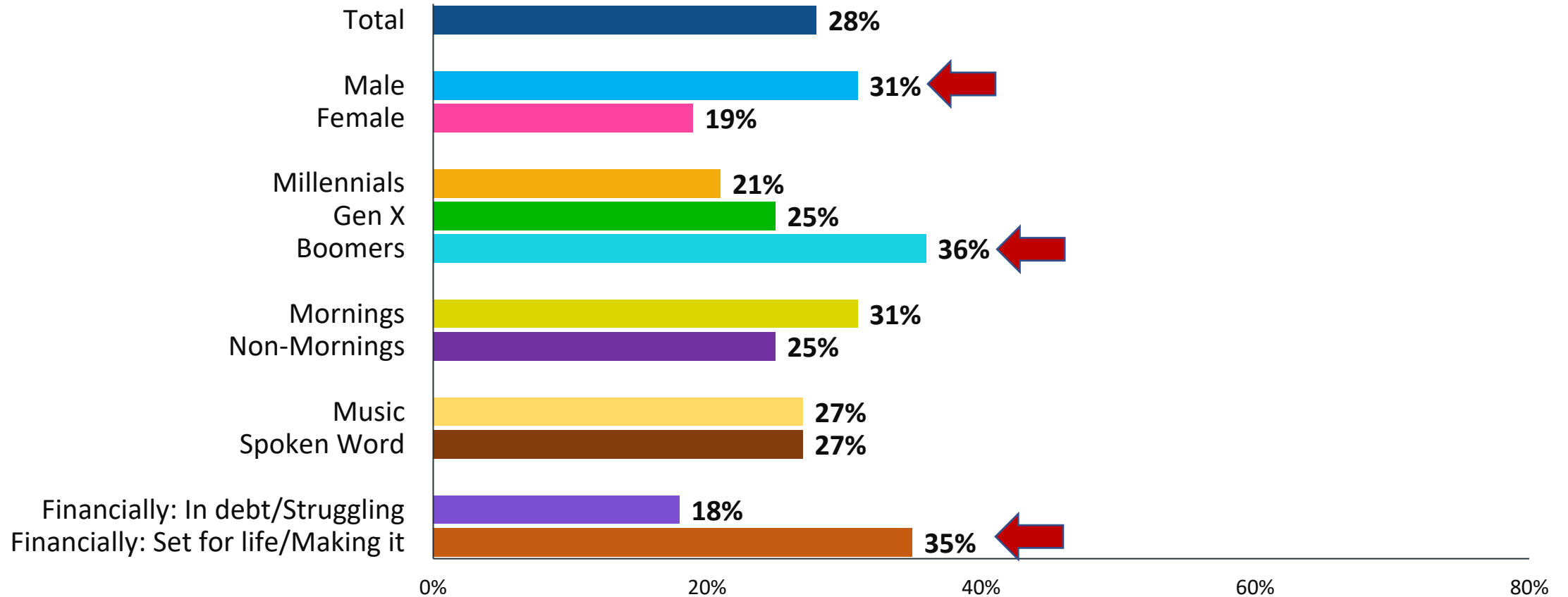
# A Tale of Two Personality Types – Happy/Loving Life Vs. the Underpaid, Overworked, and Unappreciated

% Saying Each Word/Phrase Fits “Very Well” For How They Are Personally Feeling Right Now About Their Job/Career in Radio

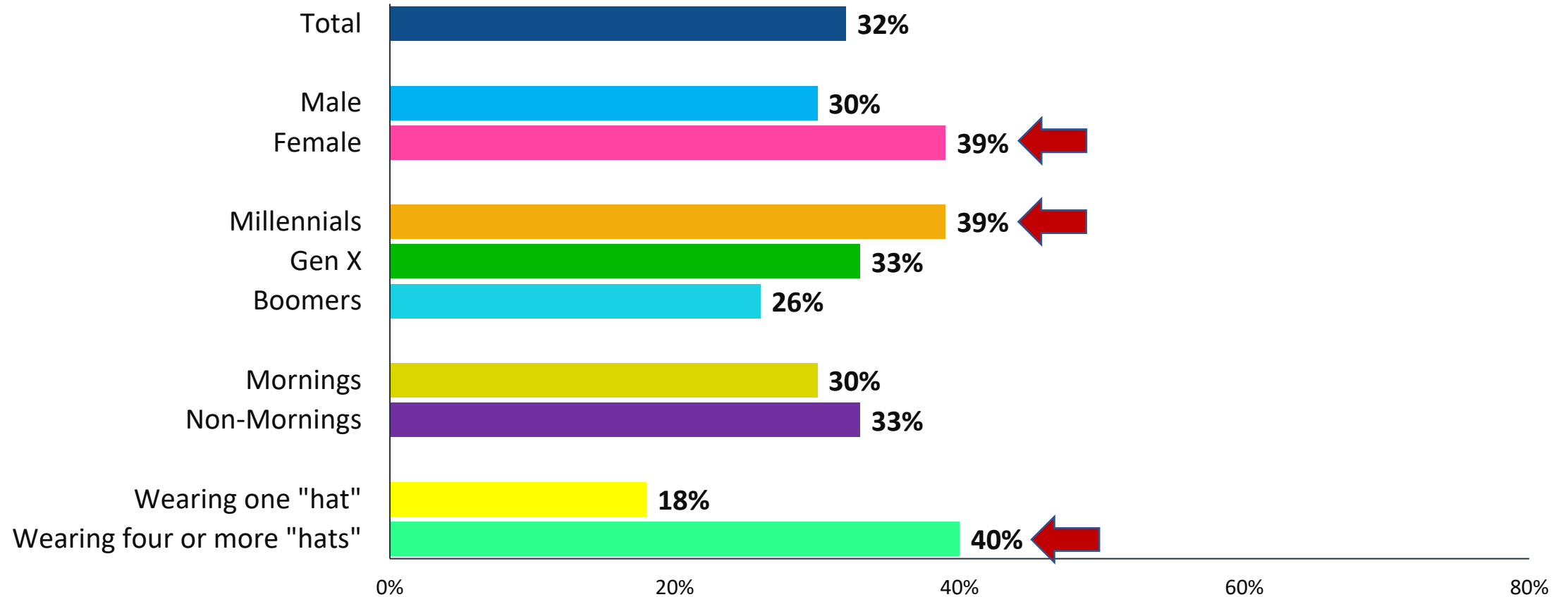




# Fits “Very Well” How Talent Is Personally Feeling About Radio: “Happy”



# Fits “Very Well” How Talent Is Personally Feeling About Radio: *“Unappreciated”*

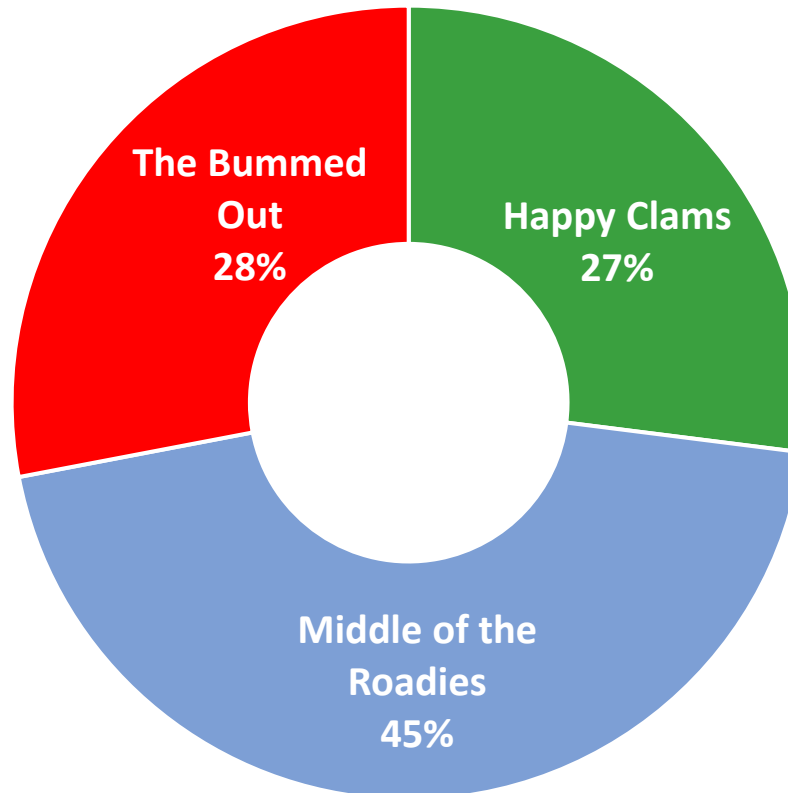






# Radio Talent: Who Are They?

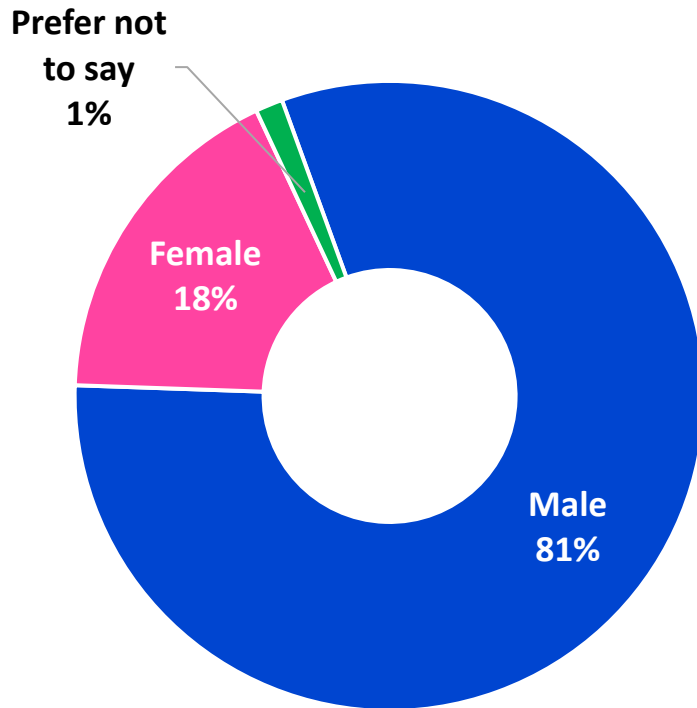
**Based on How Well Air Talent Said Various Positive and Negative Words/Phrases “Fit” How They Currently Feel**



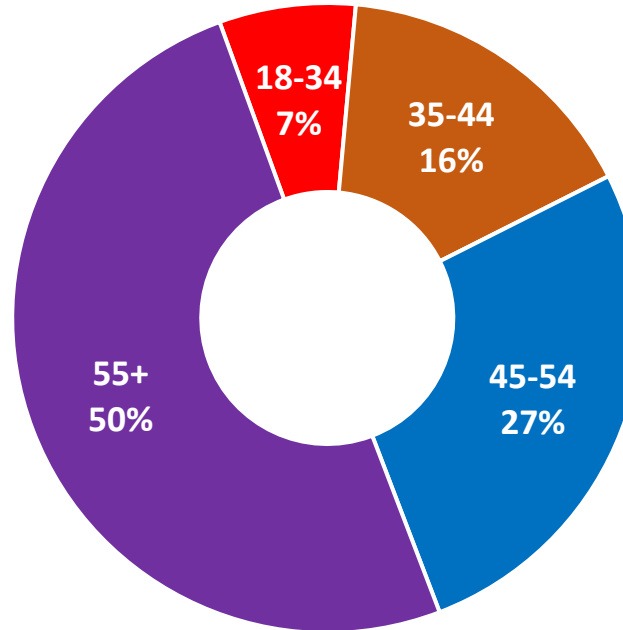
Among On-Air Talent

# Who Are the “Happy Clams?”

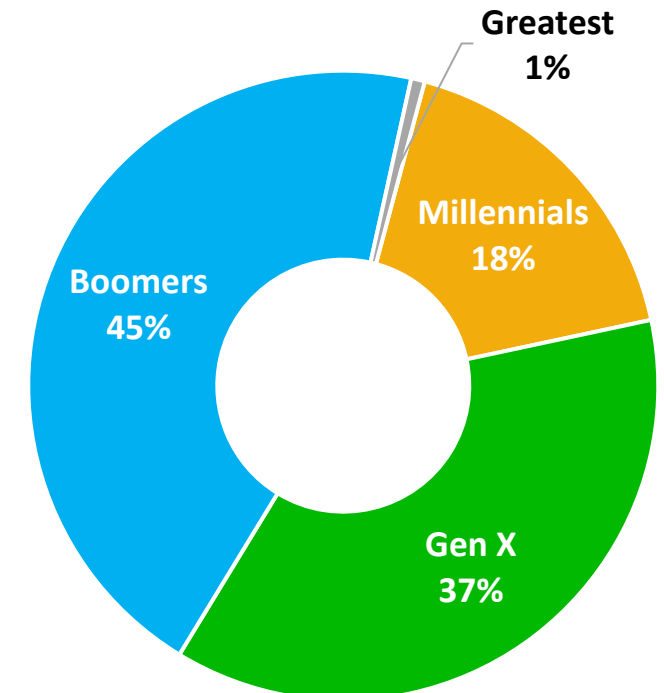
**Gender**



**Age**



**Generation**

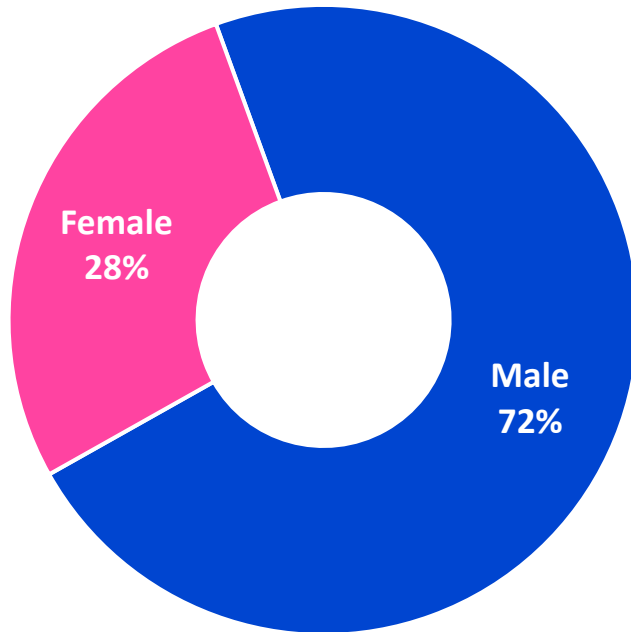


**Average Age: 52.7**

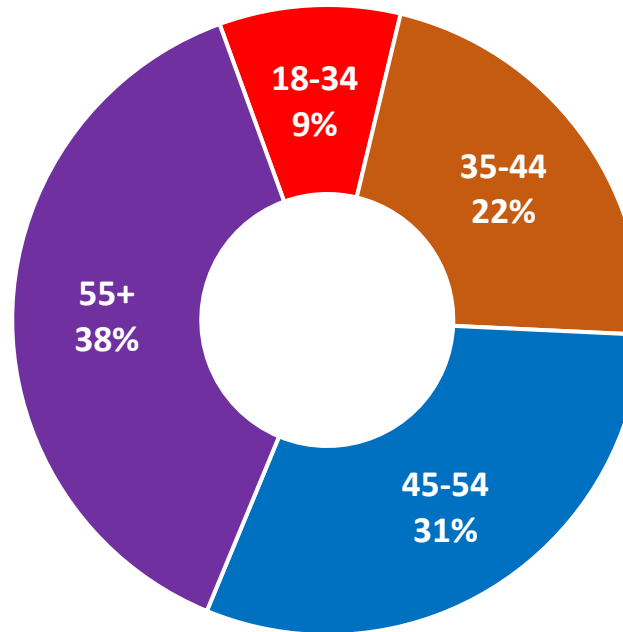
Among On-Air Talent

# Who Are the “Middle of the Roadies?”

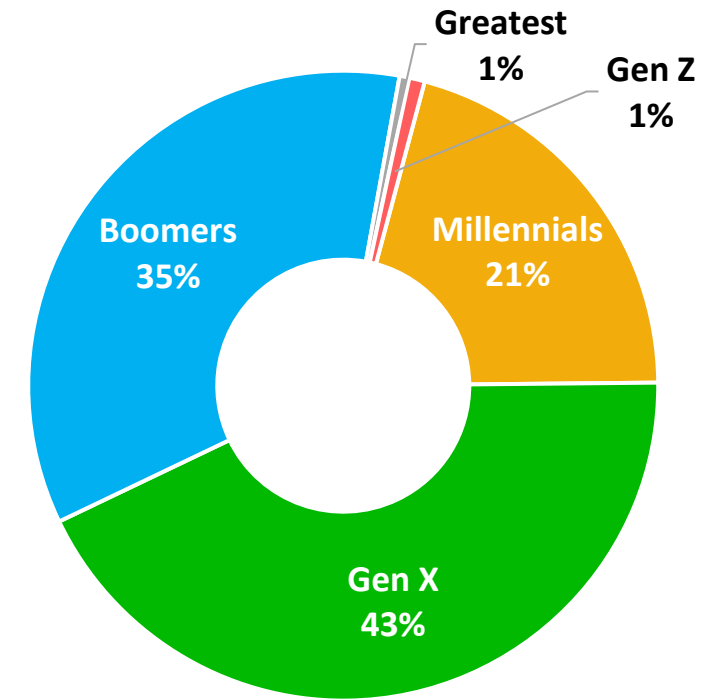
**Gender**



**Age**



**Generation**

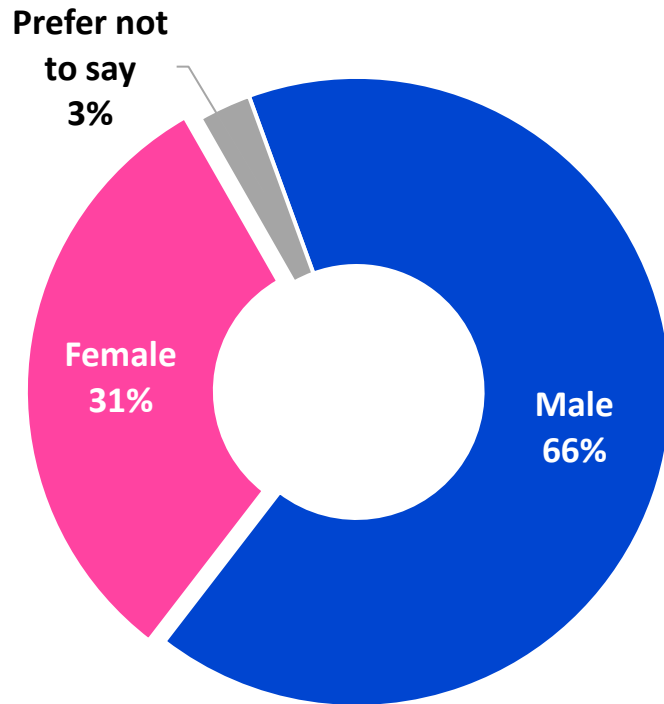


**Average Age: 50.5**

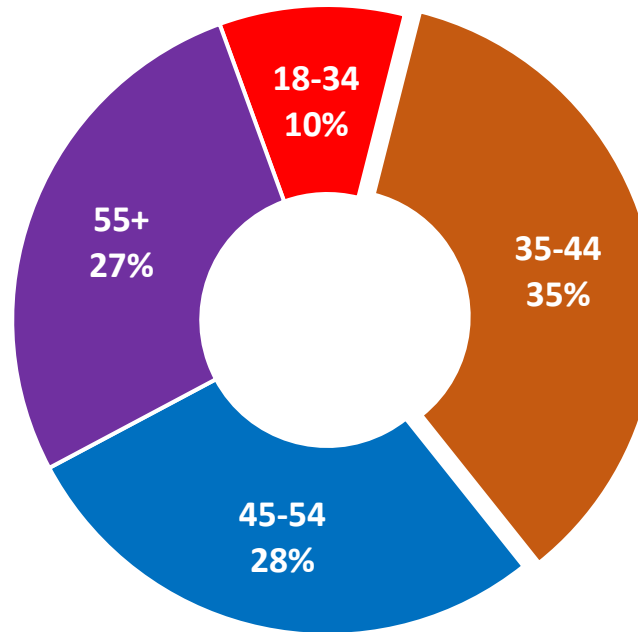
Among On-Air Talent

# Who Are “The Bummed Out?”

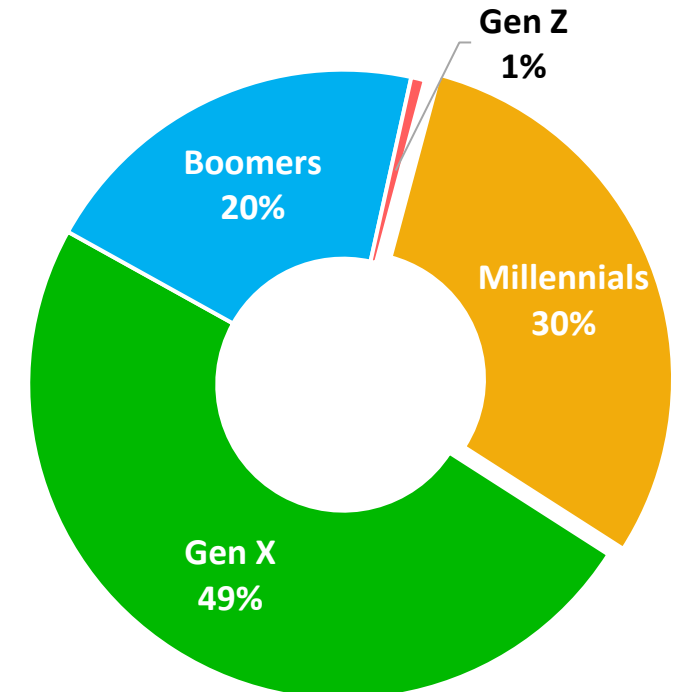
**Gender**



**Age**



**Generation**



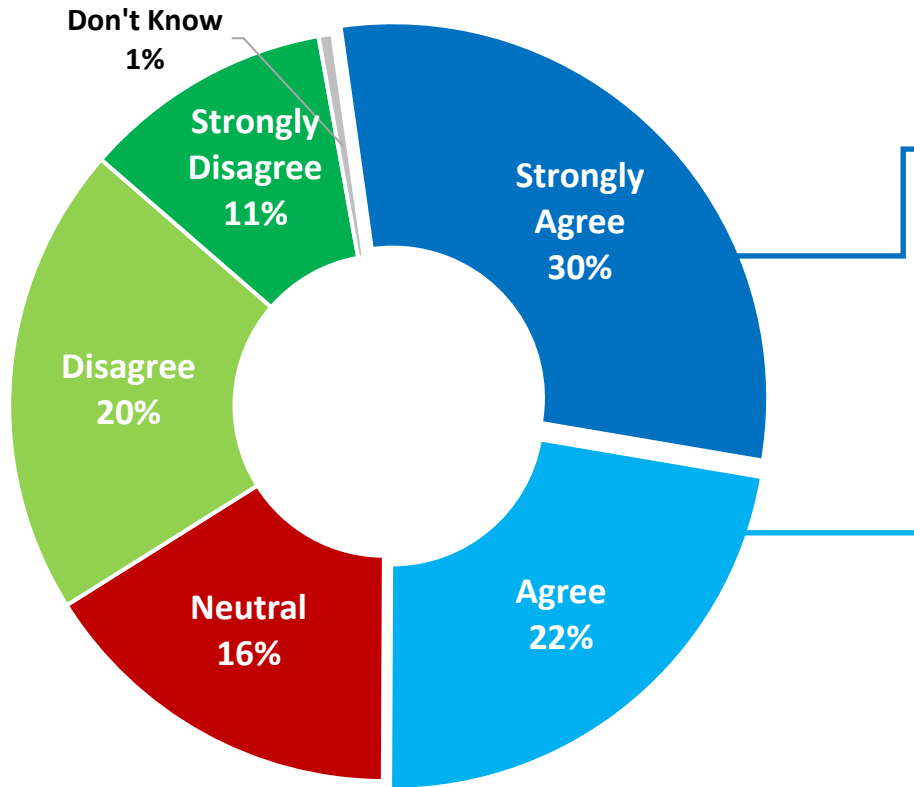
**Average Age: 47.1**

Among On-Air Talent

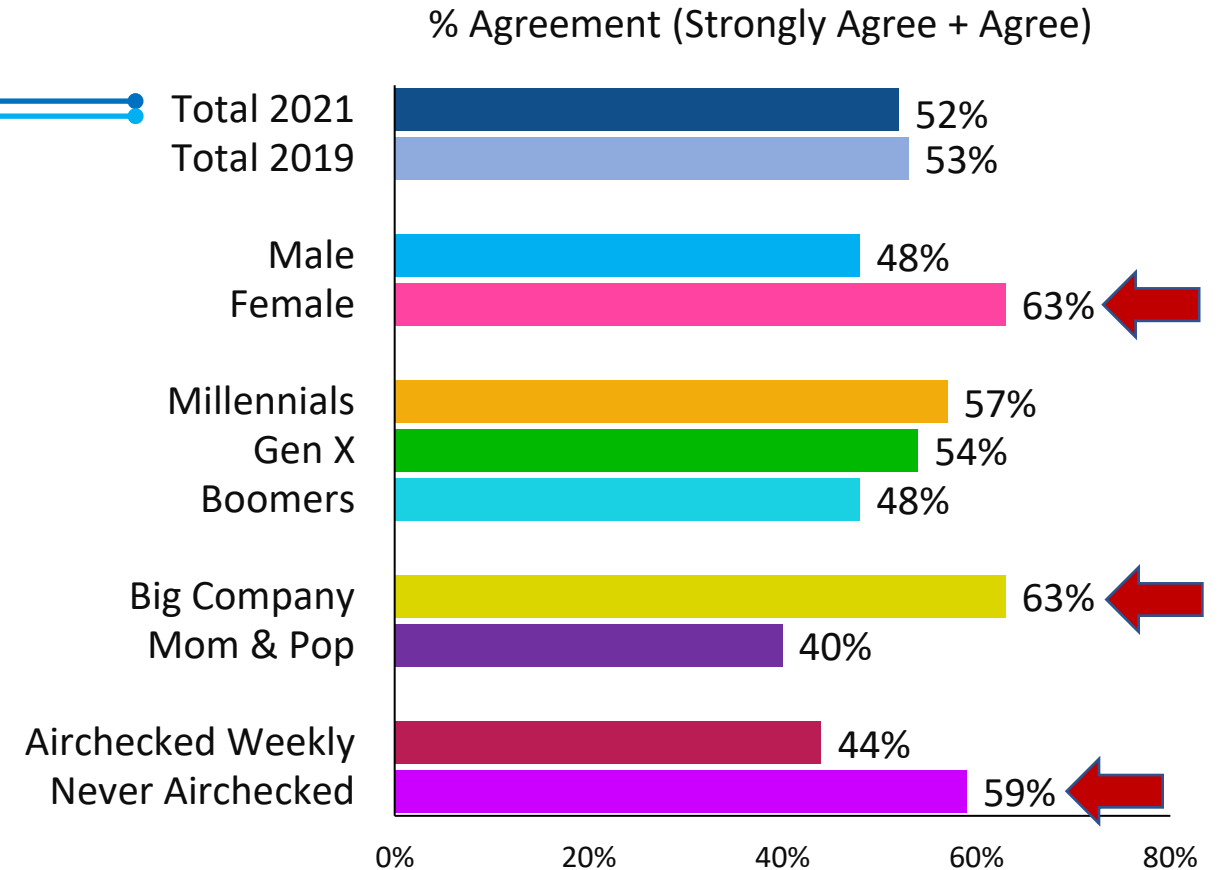




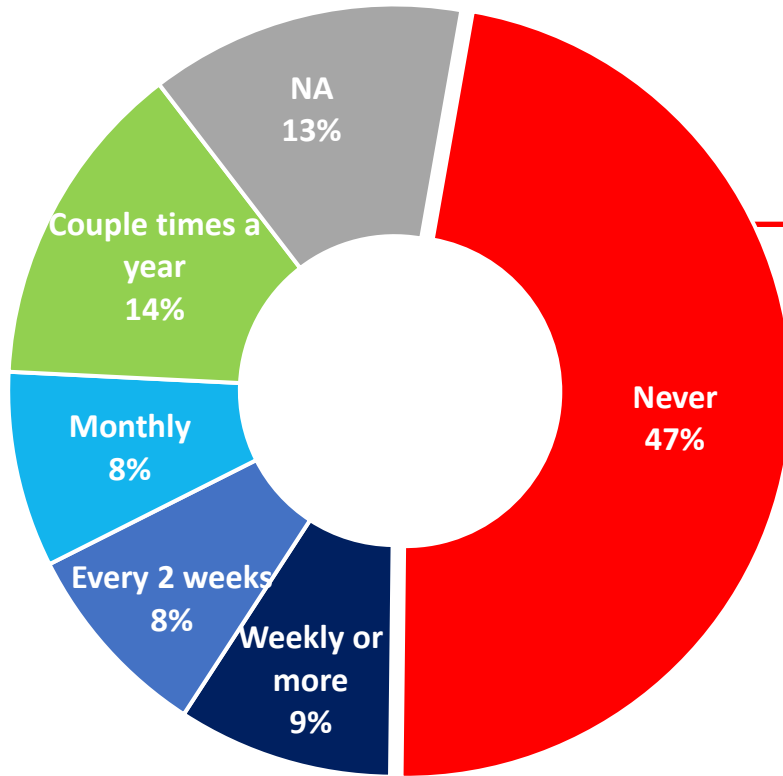
# More Than Half Say They Often Feel Underappreciated by Station Management/Ownership



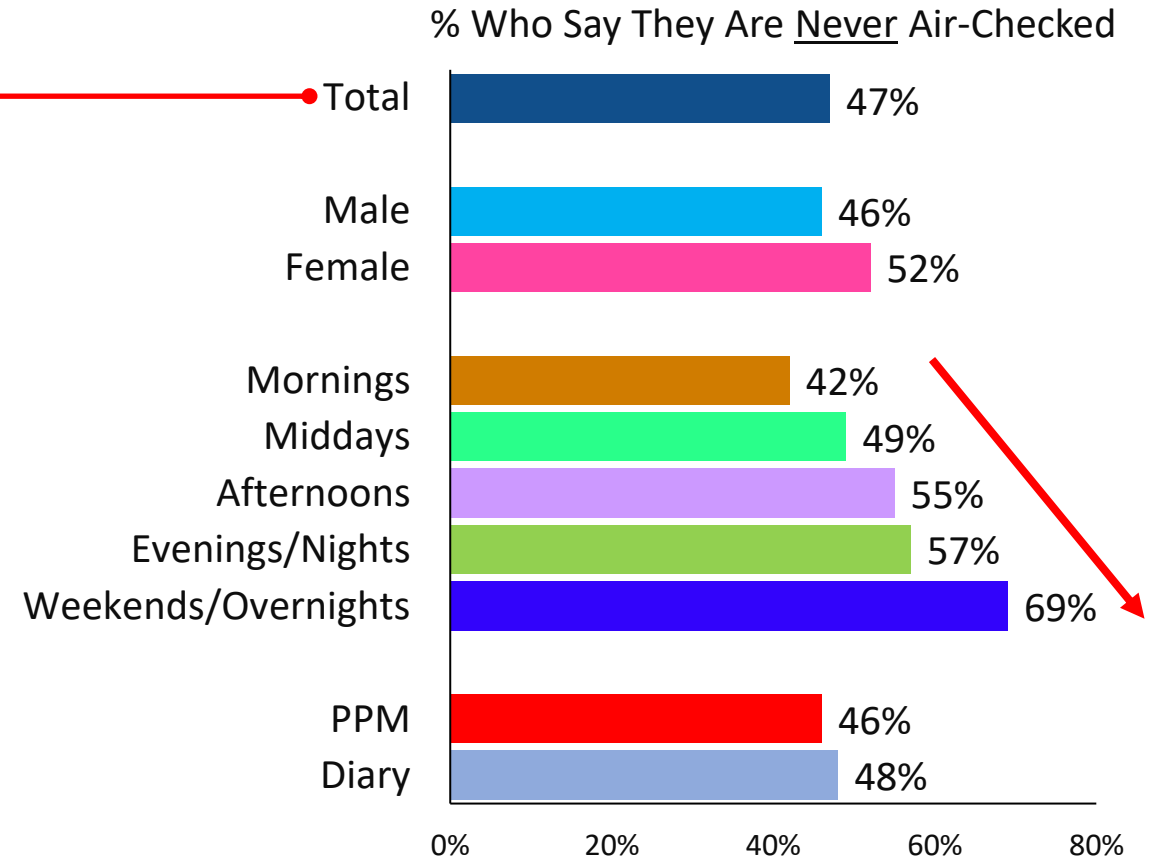
*"I often feel a sense of underappreciation by station management and/or ownership"*



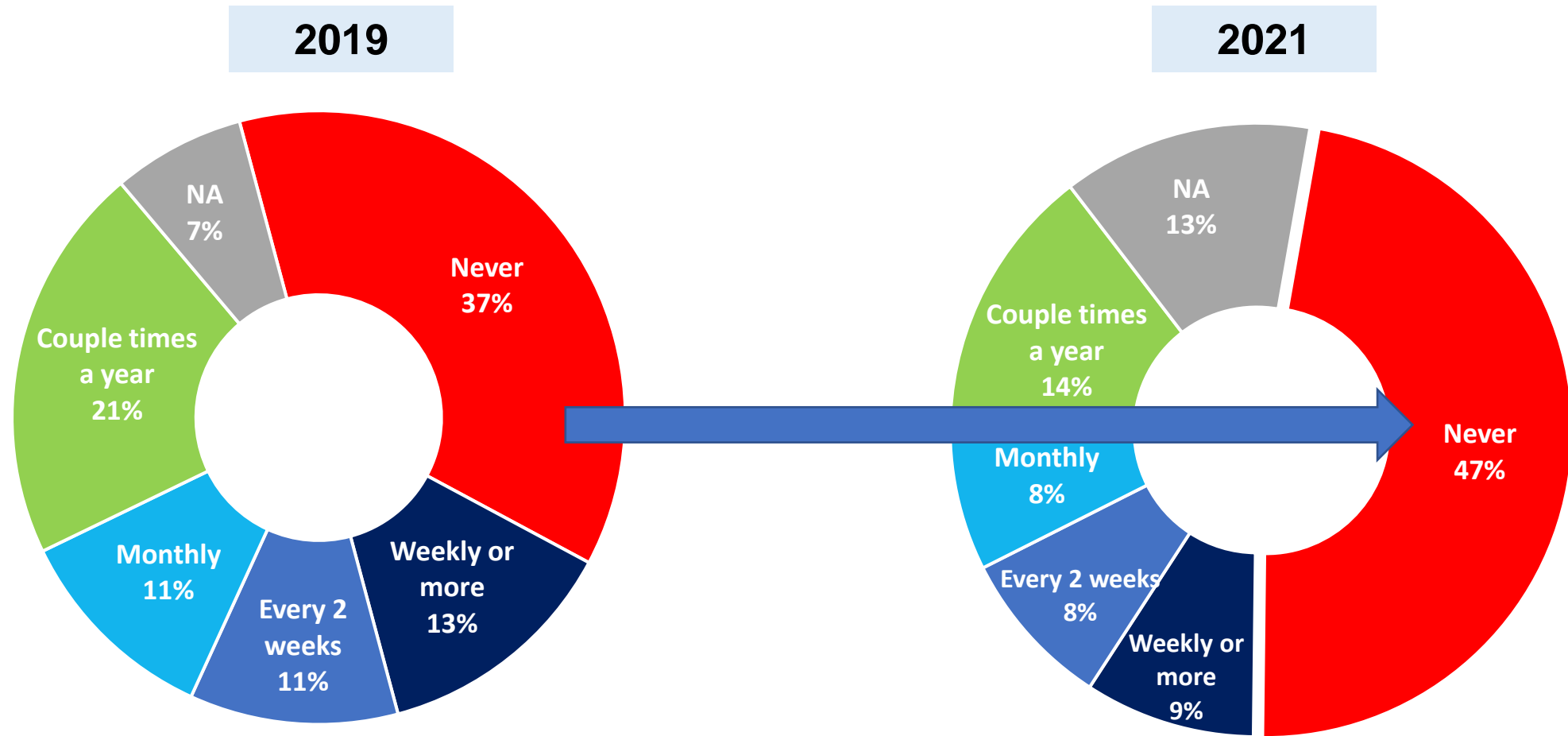
# Nearly Half Say They Are Never Airchecked; the Later the Daypart, the Less Likely Talent is Airchecked



*"Since COVID, how often have you been airchecked?"*

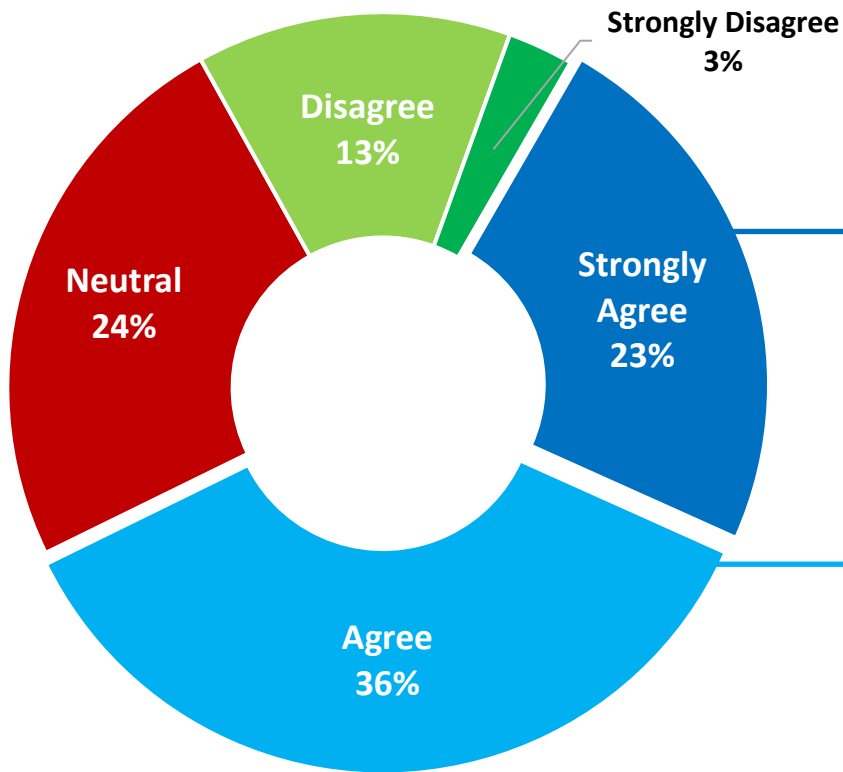


# And Airchecking Became Even Rarer in “The Year of COVID”



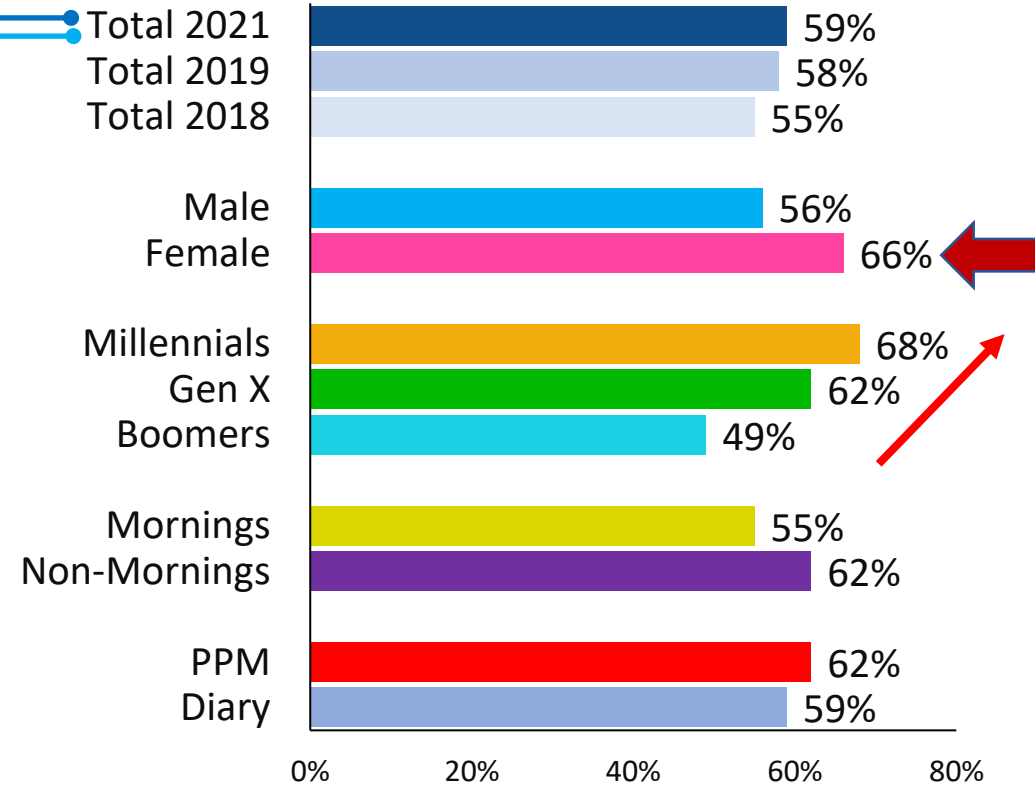


# As Stations Employ Fewer People, Many Report Feeling Angst and Insecurity

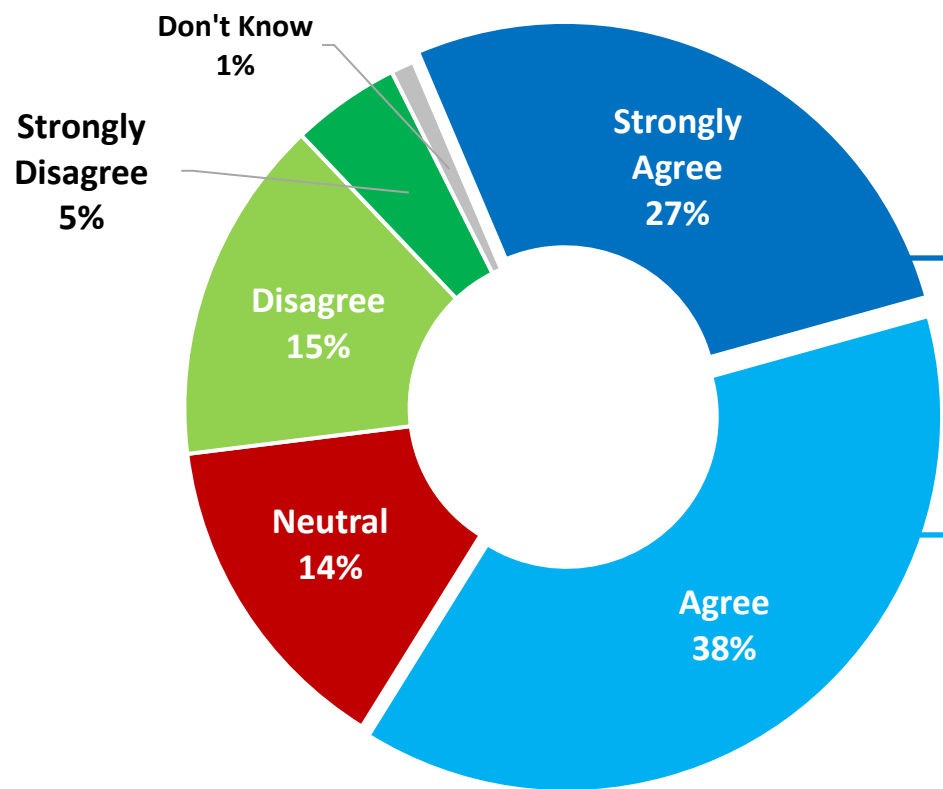


*"As stations employ fewer people, I feel a great sense of angst and insecurity"*

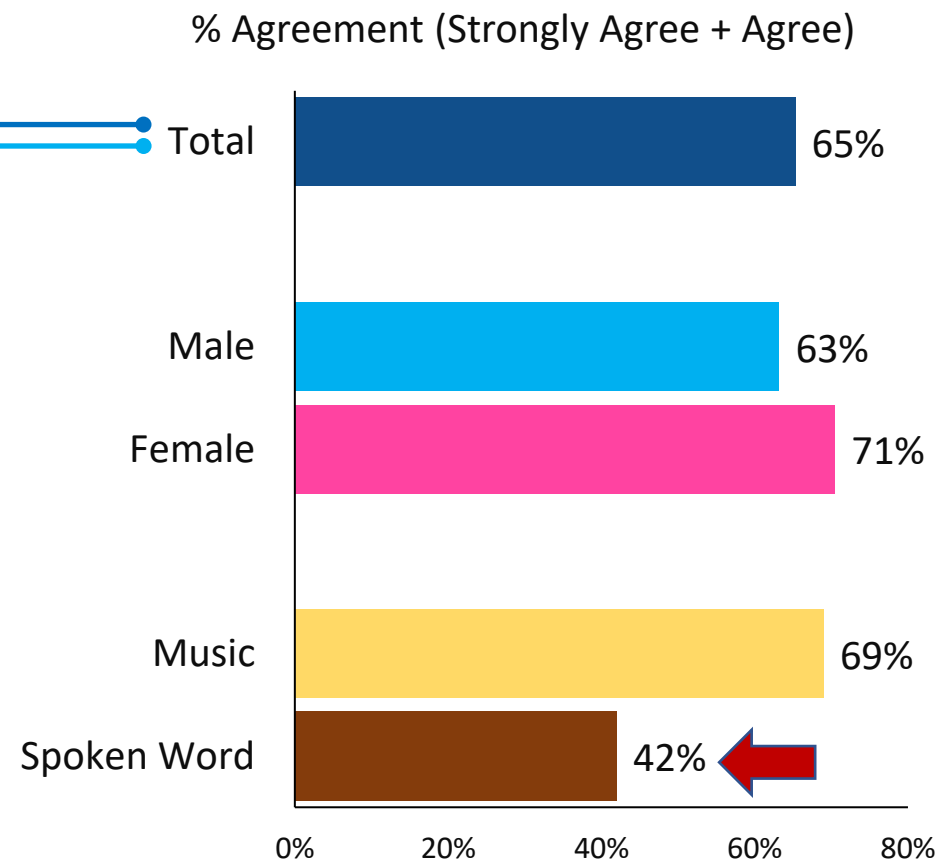
% Agreement (Strongly Agree + Agree)



# Two in Three Express Concerns With Offending the Audience, Particularly Those on the Air at Music Stations

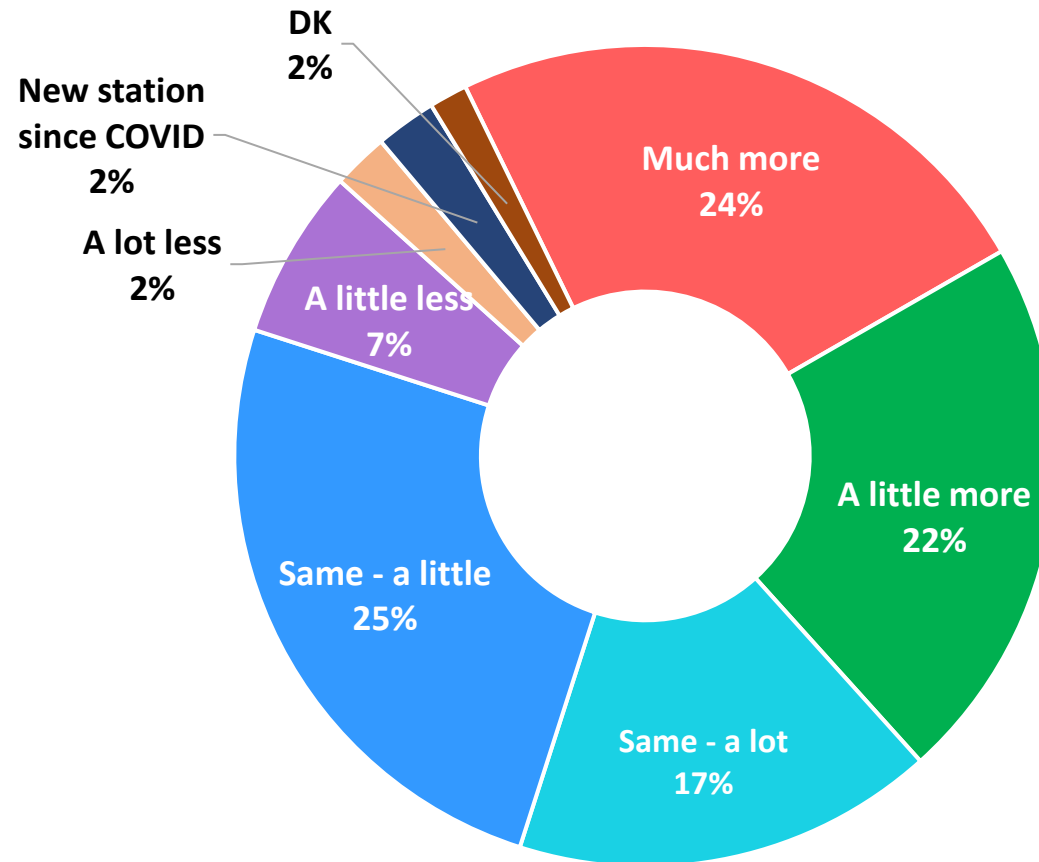


*"I'm concerned about covering topics that may offend certain segments of the station audience/my audience"*



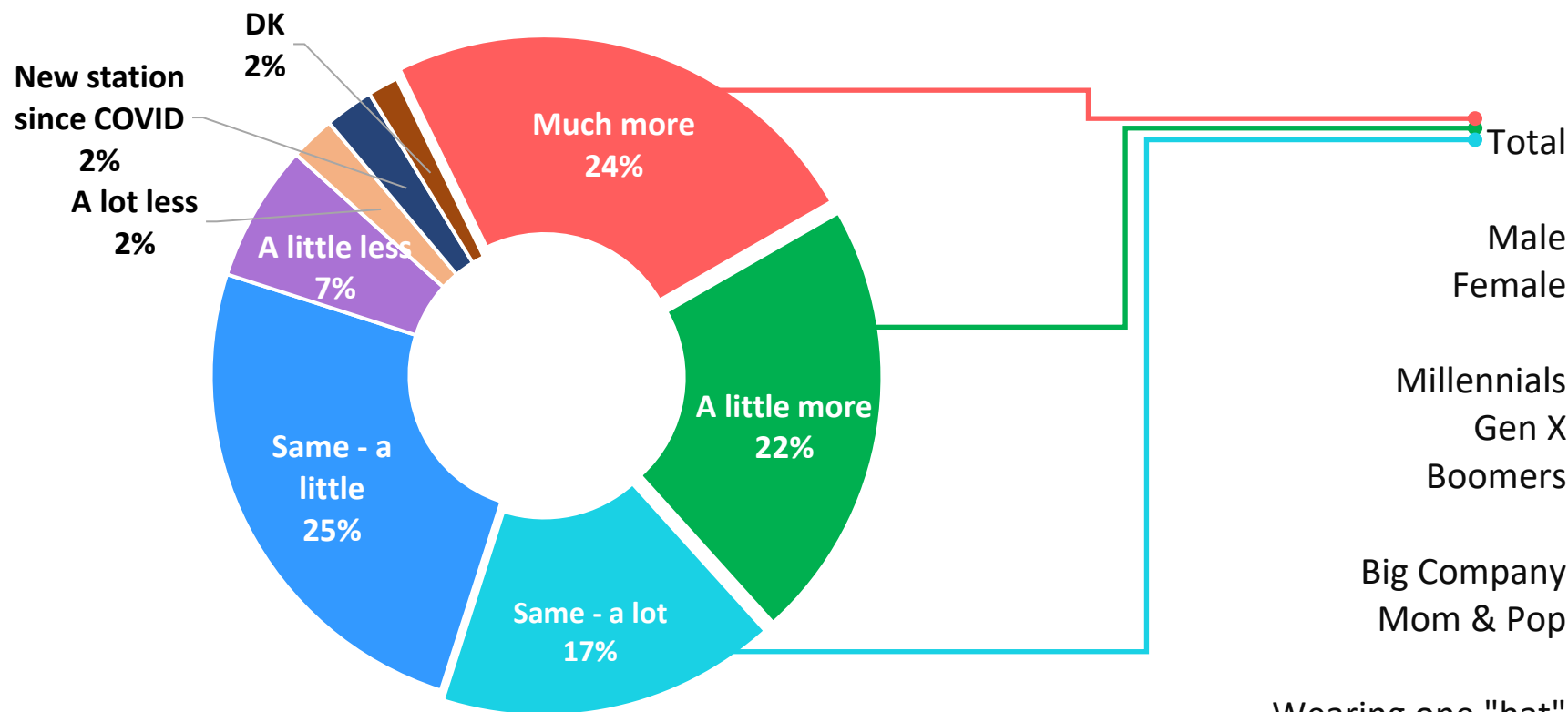
# Since COVID, More Than Six in Ten Report More/a Lot of Job Stress

*“How would you describe your overall level of job stress compared to pre-COVID?”*

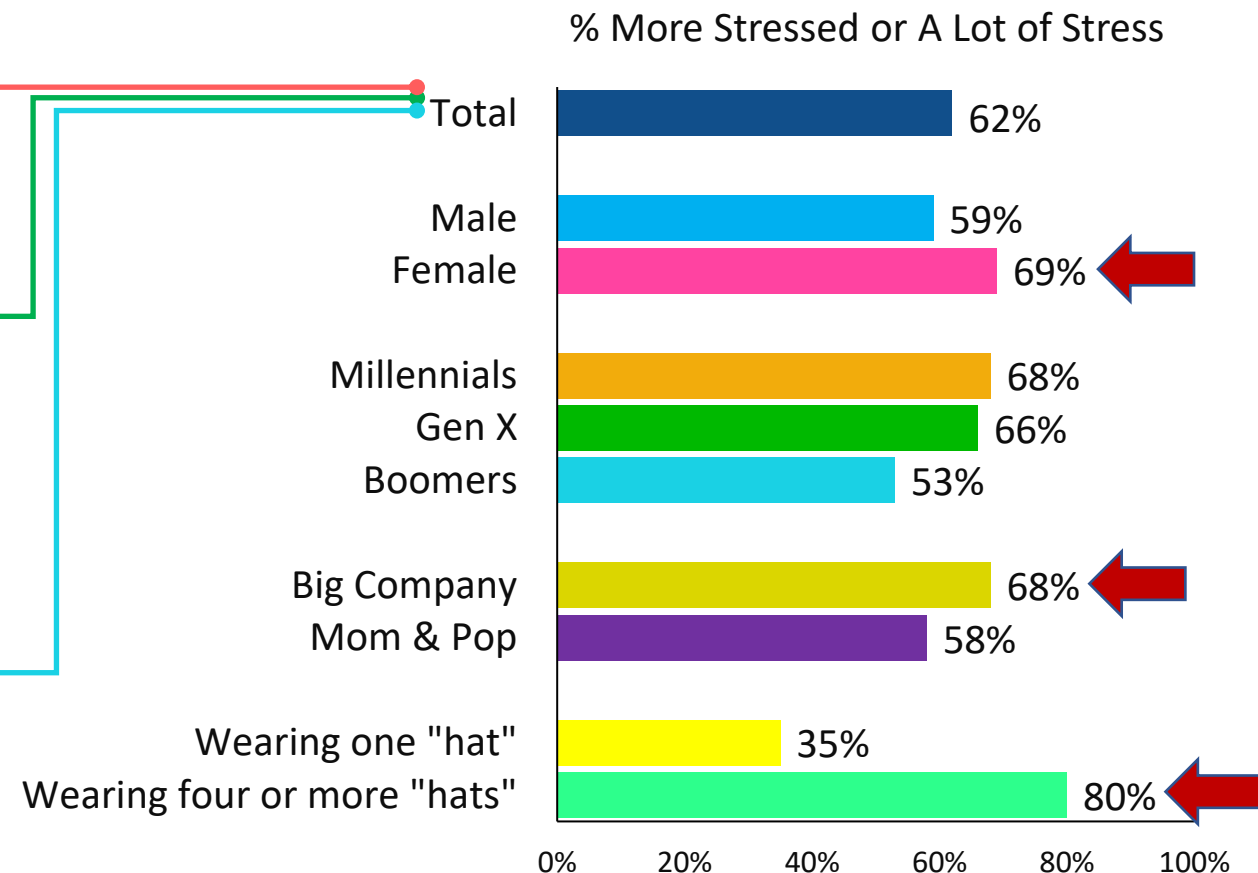


Among On-Air Talent

# Since COVID, More Than Six in Ten Report More/a Lot of Job Stress



*"How would you describe your overall level of job stress compared to pre-COVID?"*







*“Why would you say you have a lot of job stress or are more stressed today on the job than you were pre-COVID?”*

## *“Why would you say you have a lot of job stress or are more stressed today on the job than you were pre-COVID?”*

- *“I work for a company and more specifically for a boss who couldn’t care less about his air staff. He is clueless and only cares about himself & making budget so that he looks good to corporate.”* (Gen X Female, Medium Company, Music Station, Market 1-20)
- *“Declining revenues, uncertainty about personal appearances.”* (Boomer Male, Small Company, Music Station, Market 21-50)
- *“We downsized one person who had a lot of skills, and now I have to do all of her work too. I haven't been on the air in 25 years, but had to go back on when she left. It's been quite stressful for me.”* (Boomer Female, Mom & Pop, Music Station, Market 50+)
- *“I wear a lot of hats, work a minimum of 10 hours a day, and I never truly know if I'm still going to have a job tomorrow.”* (Gen X Female, Large Company, Music Station, Market 21-50)
- *“Management is more checked out, leaving us to fend more for ourselves. They've made very little effort to bridge the gap since being remote.”* (Gen X Male, Large Company, Spoken Word Station, Market 1-20)

## *“Why would you say you have a lot of job stress or are more stressed today on the job than you were pre-COVID?”*

- *“1) Less staff, 2) less money, 3) less overall resources (tech/upgrades/people, 4) uncertain business climate, 5) minimally supportive ownership.” (Gen X Male, Small Company, Spoken Word Station, Market 51+)*
- *“I'm in an extremely competitive, major market. Everyone is great at what they do and there's no time/room to have a bad day. That's the type of stress I want, and thrive in, to be honest.” (Gen X Male, Large Company, Music Station, Market 1-20)*
- *“Much more automation, no young engineers, less staff than pre-COVID, lack of local commitment.” (Gen X Male, Large Company, Music/Spoken Word Station, Market 21-50)*
- *“I had a great co-host who was furloughed then terminated due to COVID. We did a really fun show together, working with her made my job easier. Now that she's gone I feel I have to work twice as hard, to have a good show, but still not as good as it was with her. Add all of that and on top of my MD and PD duties, I usually don't go home until about 3pm everyday. I used to get done around 12:30, 1p... I feel exhausted all the time.” (Gen X Female, Medium Company, Music Station, Market 50+)*

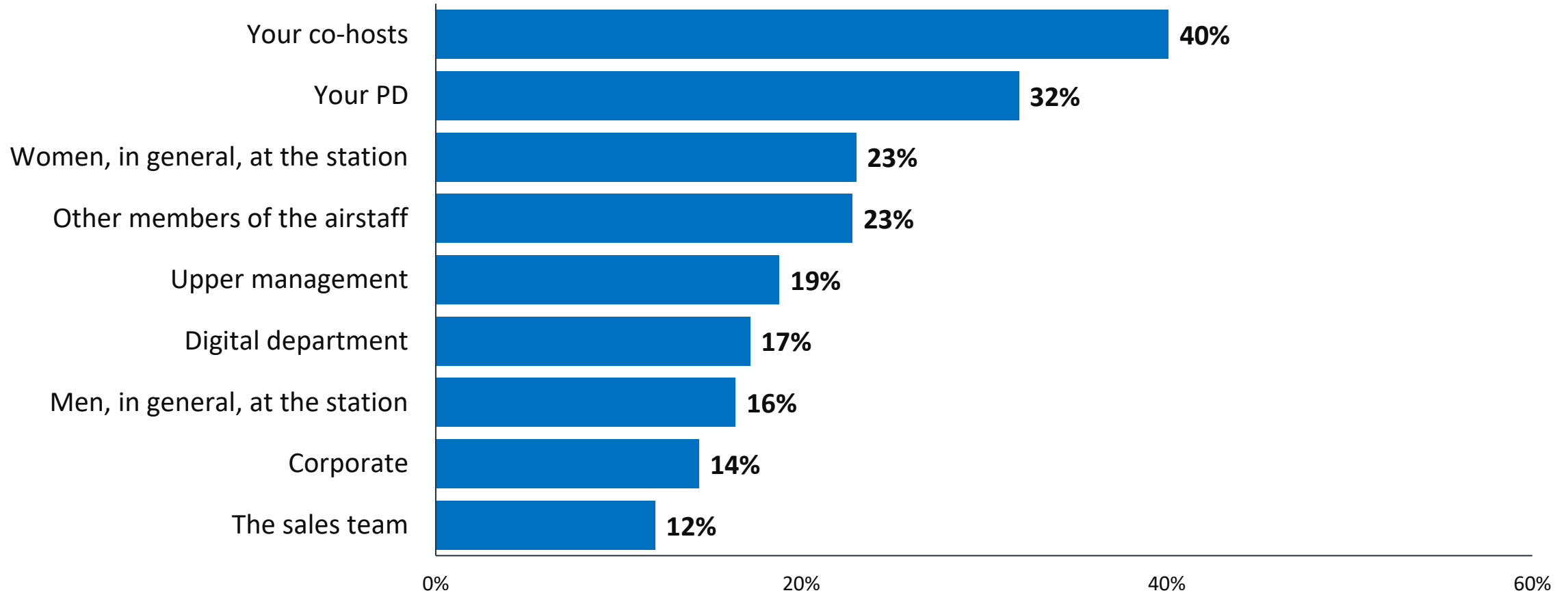
## *“Why would you say you have a lot of job stress or are more stressed today on the job than you were pre-COVID?”*

- *“We've been working nonstop during the pandemic. It's depressing to see others work from home, when we never had the option, and we certainly haven't been appreciated or received any kind of bonus or raise.”* (Gen X Male, Small Company, Music Station, Market 21-50)
- *“Because we all wore several hats before COVID. Now, with less people, we are wearing even more. There is simply not enough time in the day to complete projects or tasks that need to be completed.”* (Millennial Male, Small Company, Music Station, Market 21-50)
- *“The news cycle is never ending. Prepping, booking guests, tracking the micro level of the news cycle all day long from 3am to 10pm. I'm always working. Producers should also get bonuses for show success because they work longer hours than anyone, even the hosts.”* (Gen X Female Producer, Large Company, Spoken Word Station, Market 1-20)
- *“I'm taking care of some office responsibilities that were never part of my job before. Also, lack of day-to-day interaction with many team members outside of programming.”* (Boomer Male, Large Company, Music Station, Market 21-50)





# Since COVID, Strong Support Is Far More Likely to Come From Co-Hosts Than Sales or Corporate



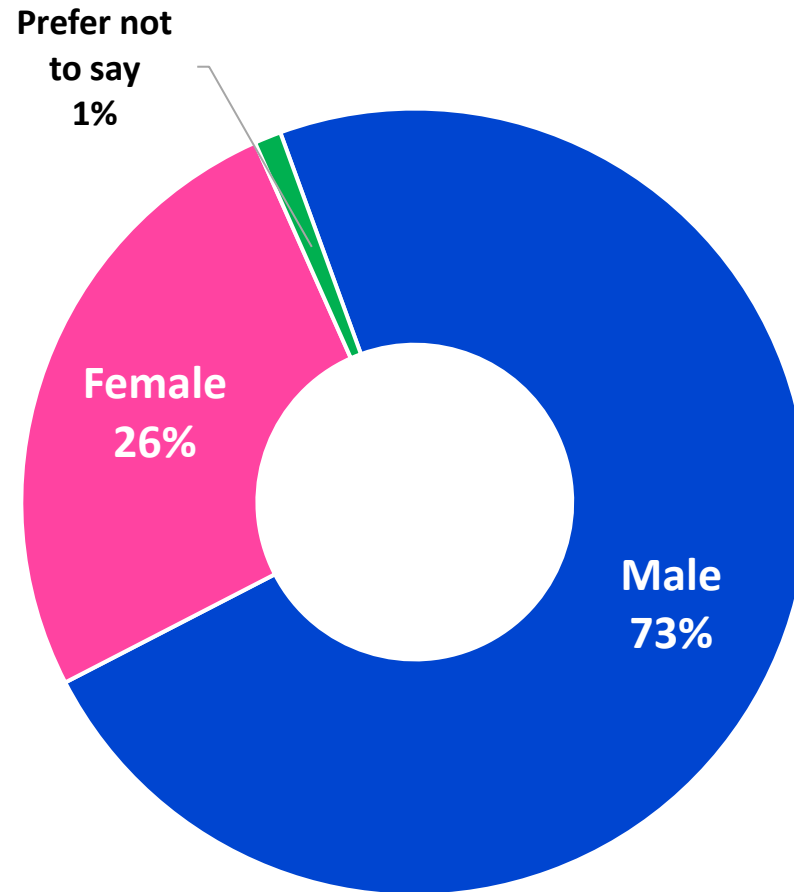
Among On-Air Talent, % saying they get an “Excellent” amount of support from each since the COVID outbreak, among those in which it applies





# Who We Surveyed

## Gender

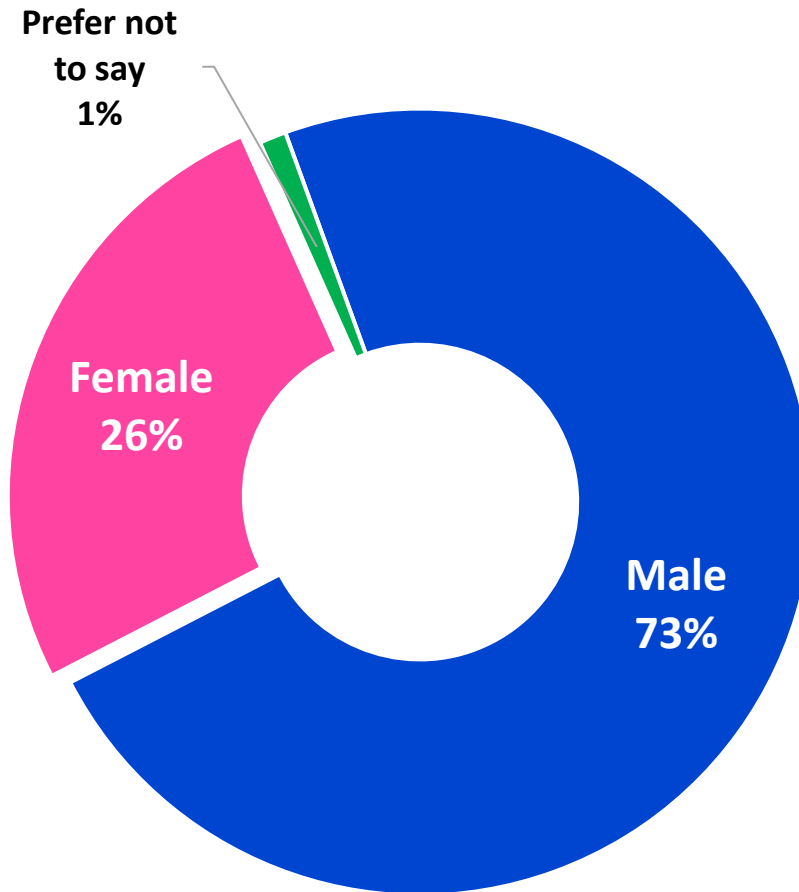


Among On-Air Talent



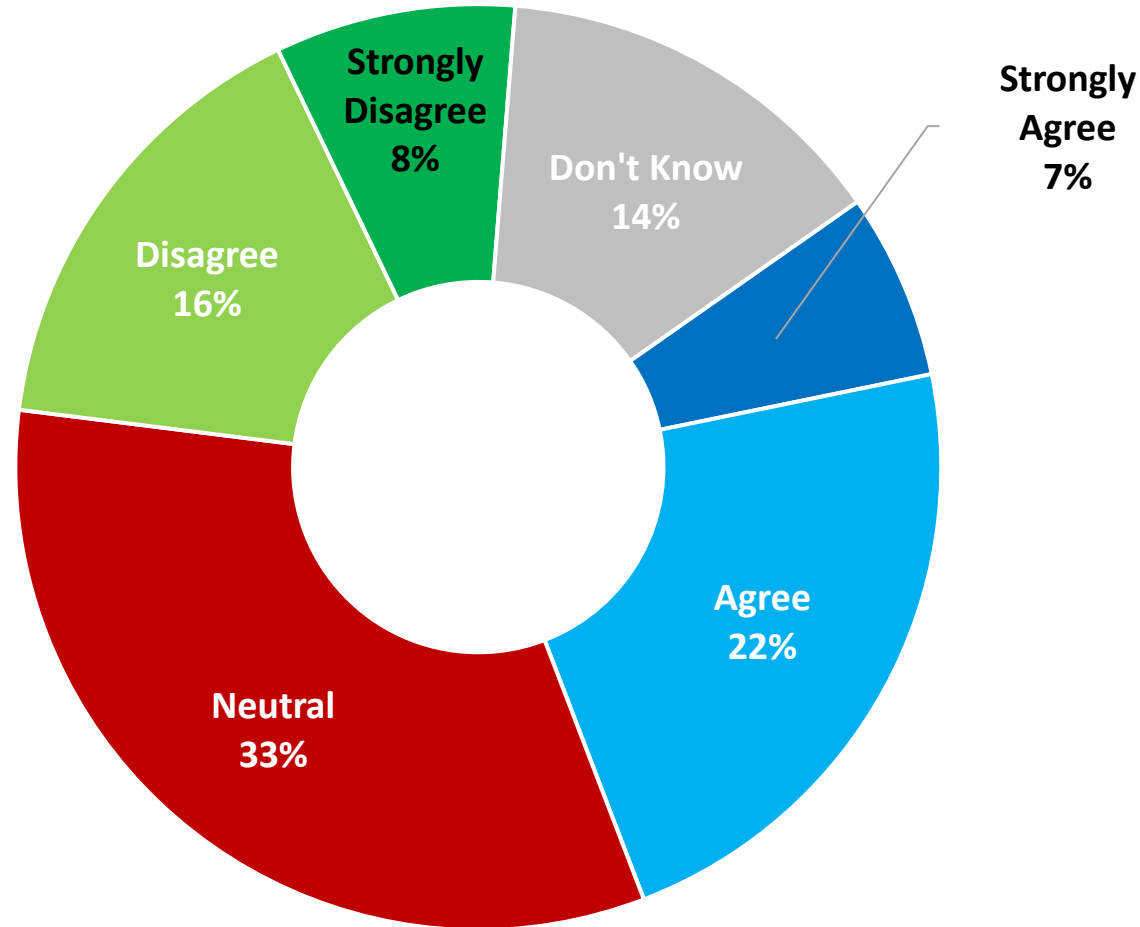
# Who We Surveyed

## Gender



Among On-Air Talent

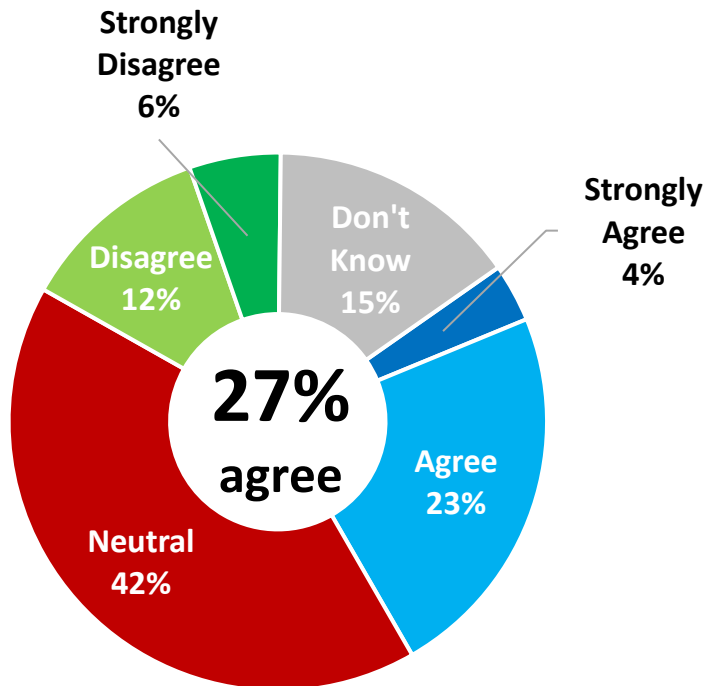
# Nearly Three In Ten Say the #MeToo Movement Has Made Radio a Safer Place for Women in Radio



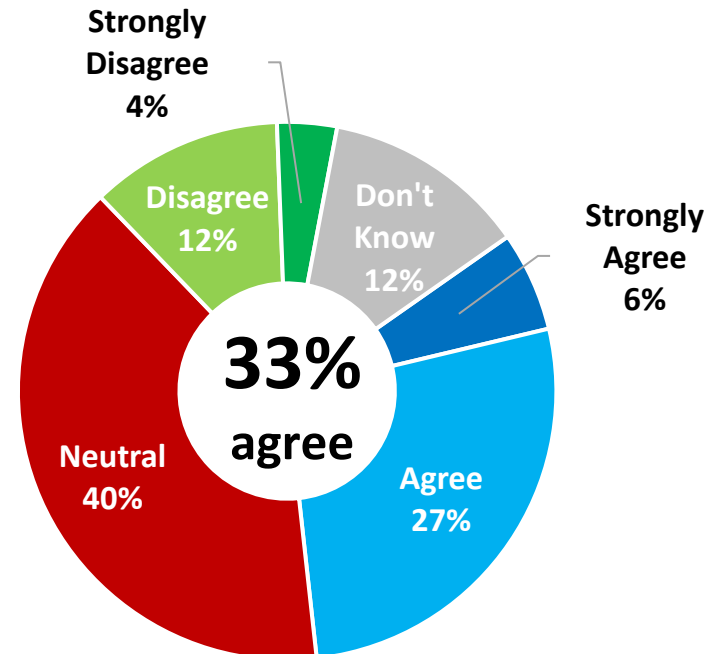
*"The #MeToo movement has helped  
make radio a safer place for women"*  
Among On-Air Talent

# Since 2019, Fewer Agree the #MeToo Movement Has Made Radio a Safer Place for Women

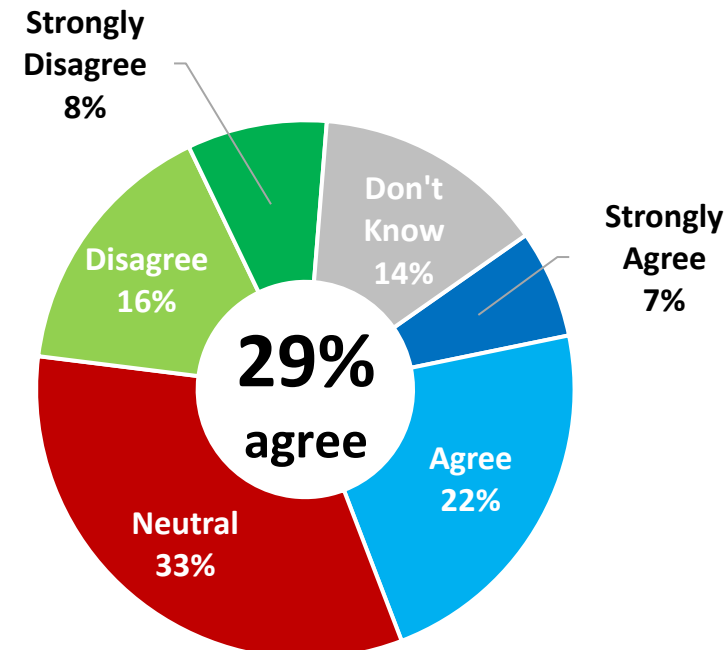
2018



2019



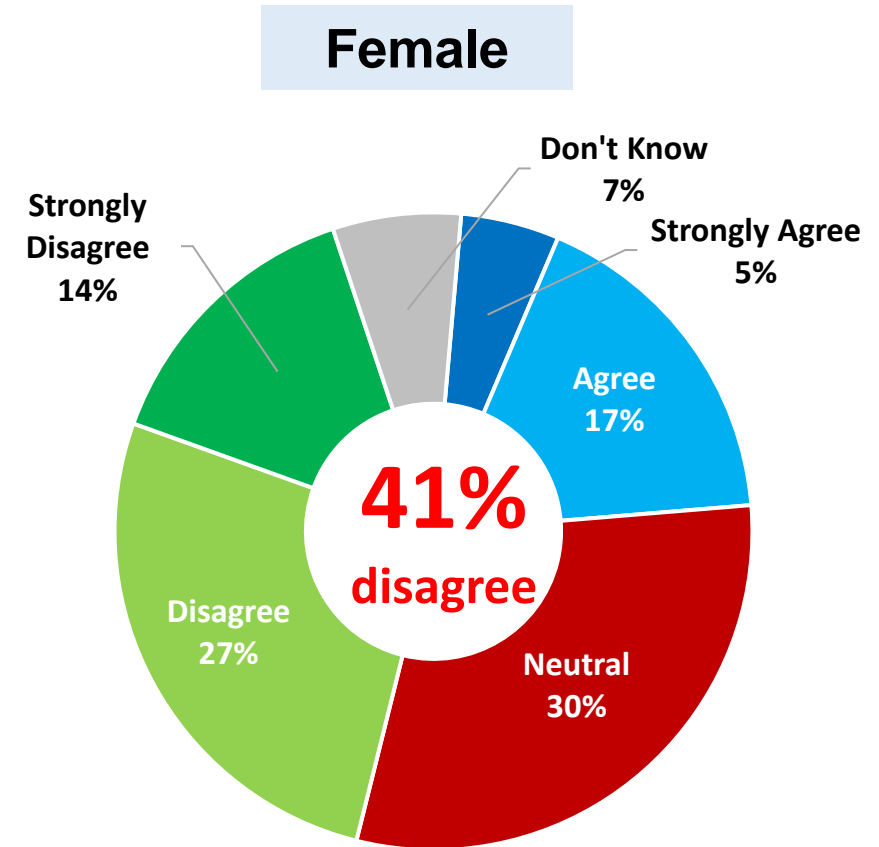
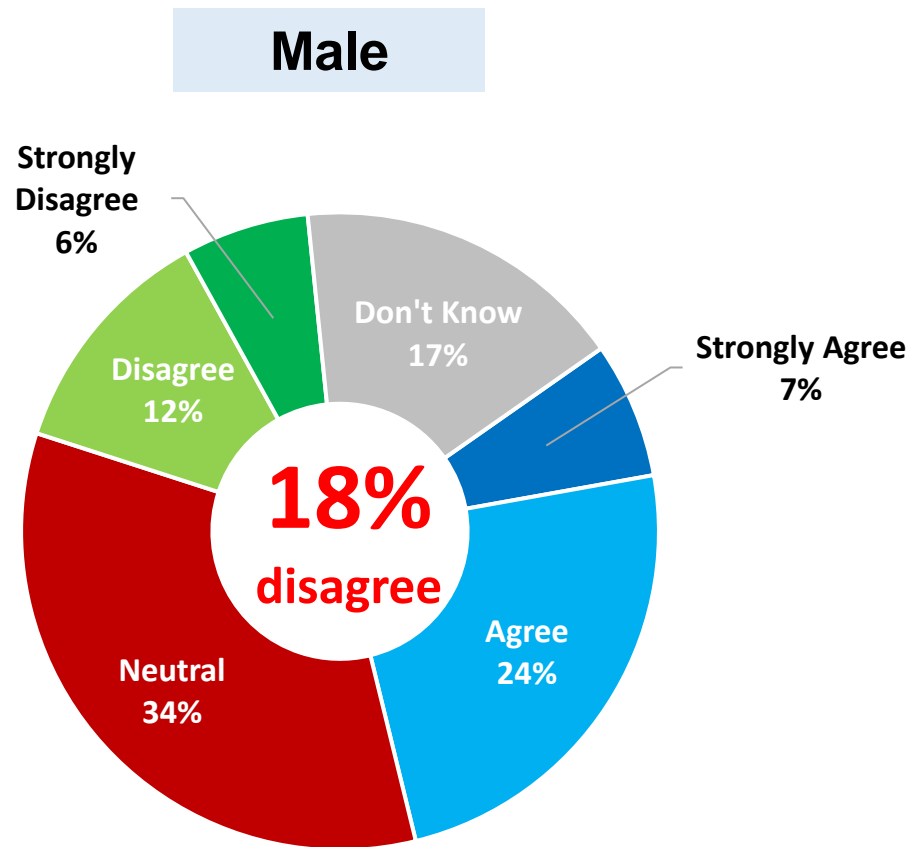
2021



*"The #MeToo movement has helped make radio a safer place for women"*

Among On-Air Talent

# Men Are Far More Likely to Agree About the #MeToo Movement's Effect on Making Radio Safer for Women

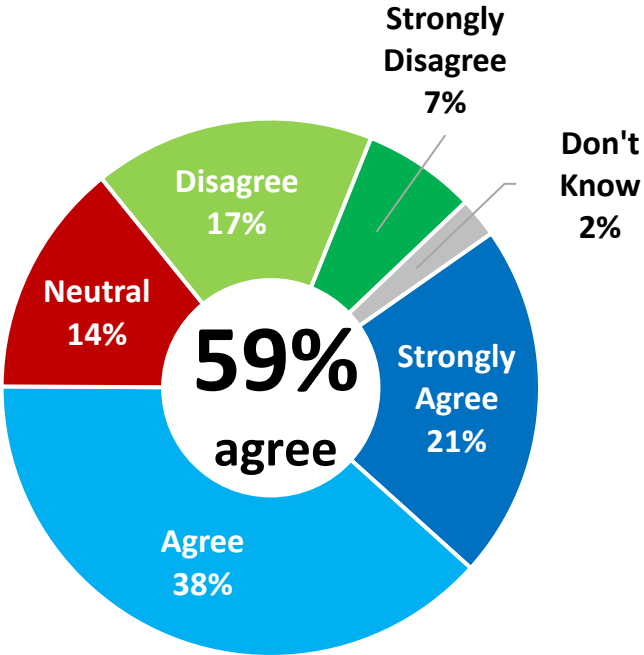


*"The #MeToo movement has helped  
make radio a safer place for women"*  
Among On-Air Talent

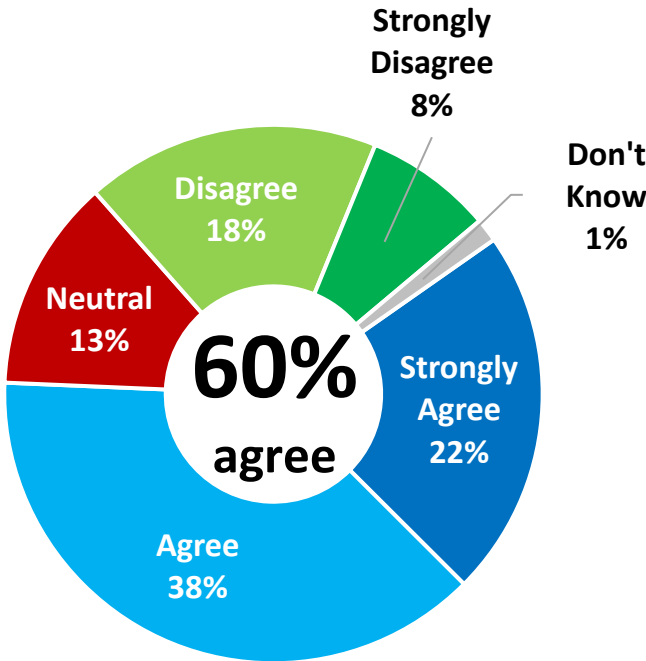


# While Most Agree There Is Equal Opportunity for Advancement For Men and Women, Fewer Now Agree Than Pre-COVID

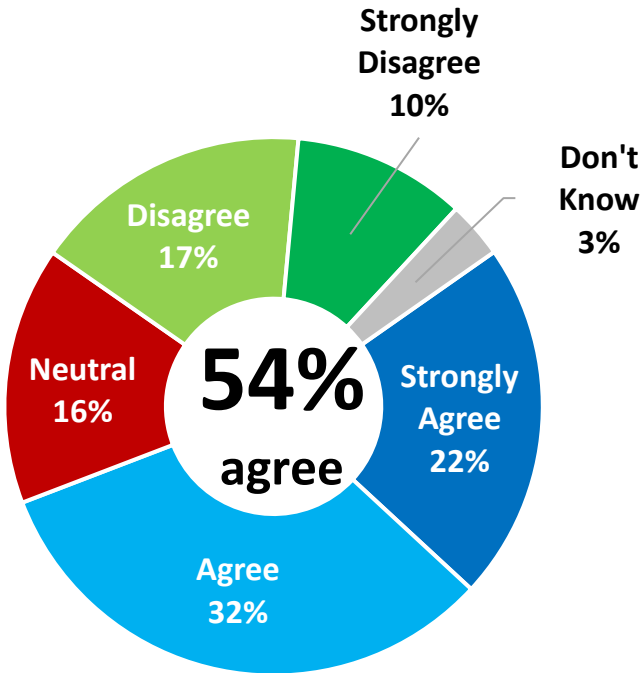
2018



2019

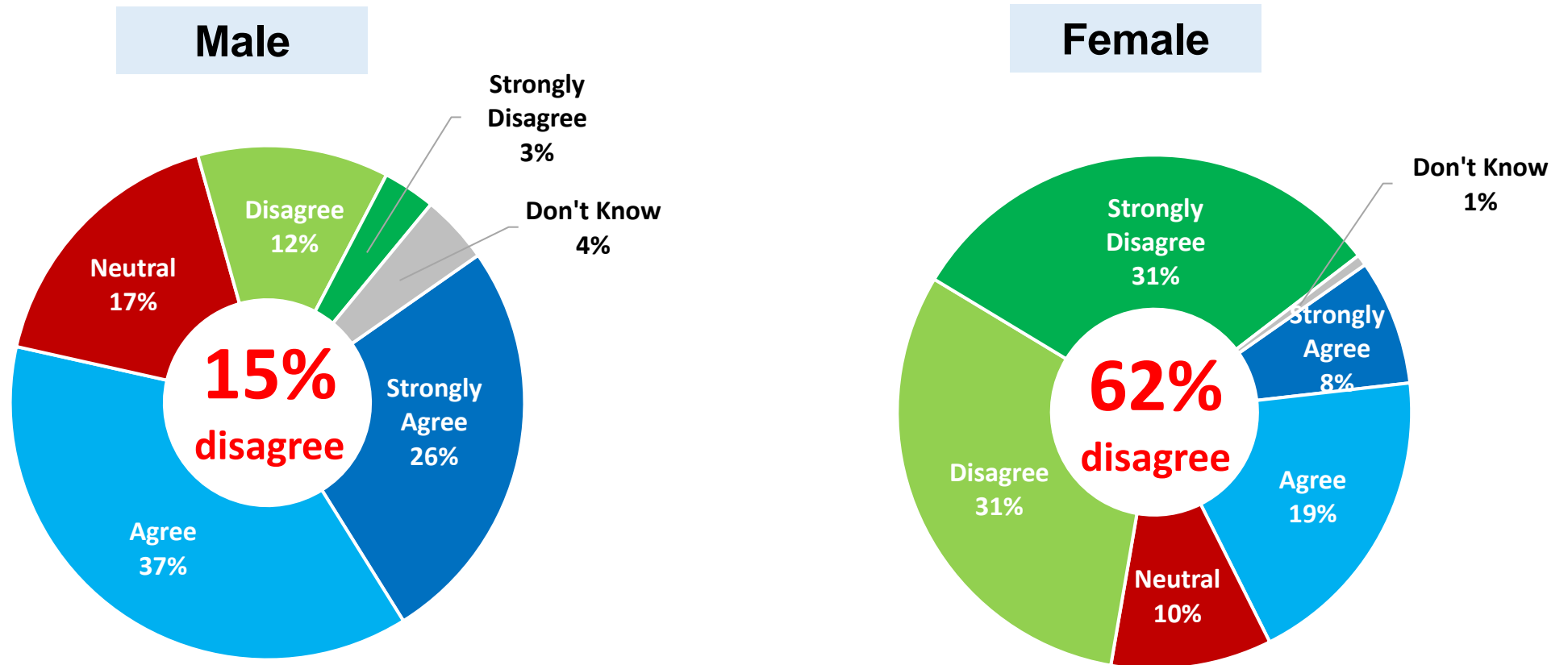


2021



*“Women have as good a chance as men to advance in the air studio”*  
Among On-Air Talent

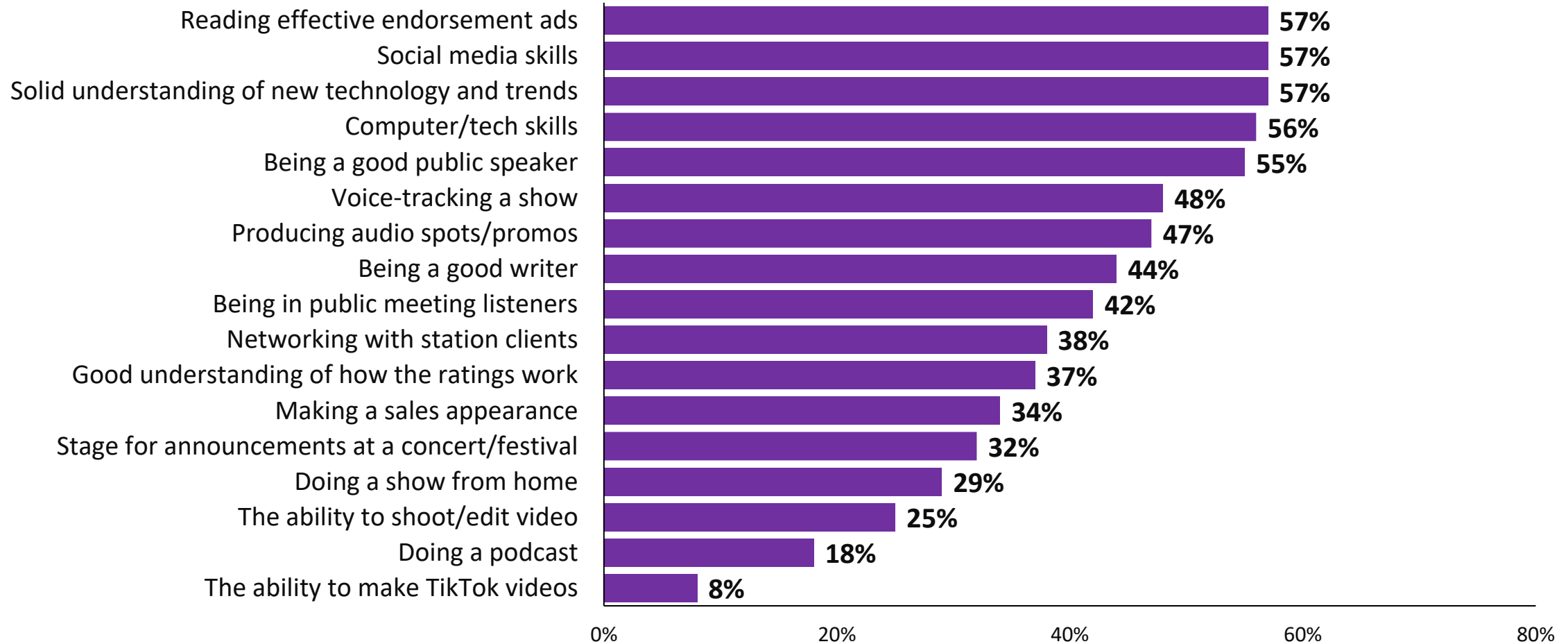
# More Than Six in Ten Women Disagree There Is Gender Equality For Advancement – More Than 4x the Men



*"Women have as good a chance as men to advance in the air studio"*  
Among On-Air Talent



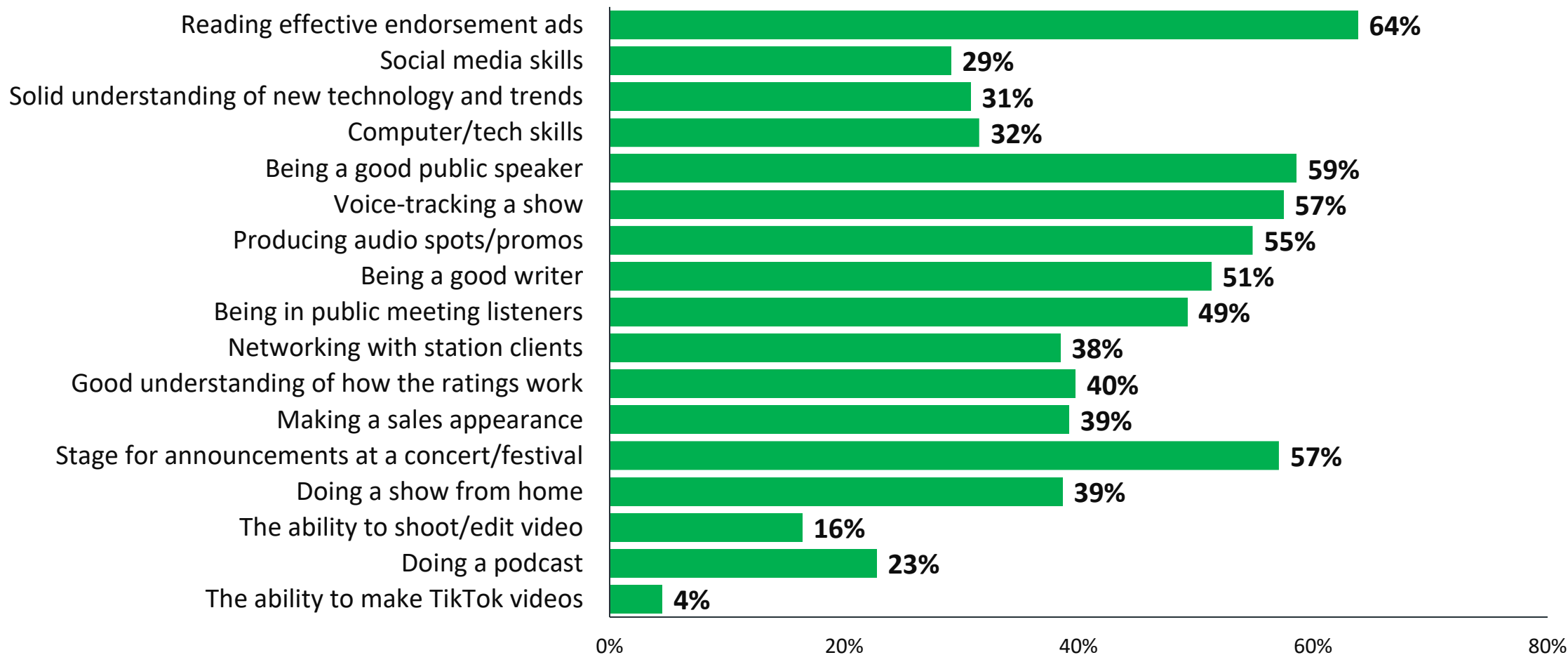
# Very Important Skills for Being Successful on the Air



Among On-Air Talent, % who say each skill is  
"very important" to being successful on the air

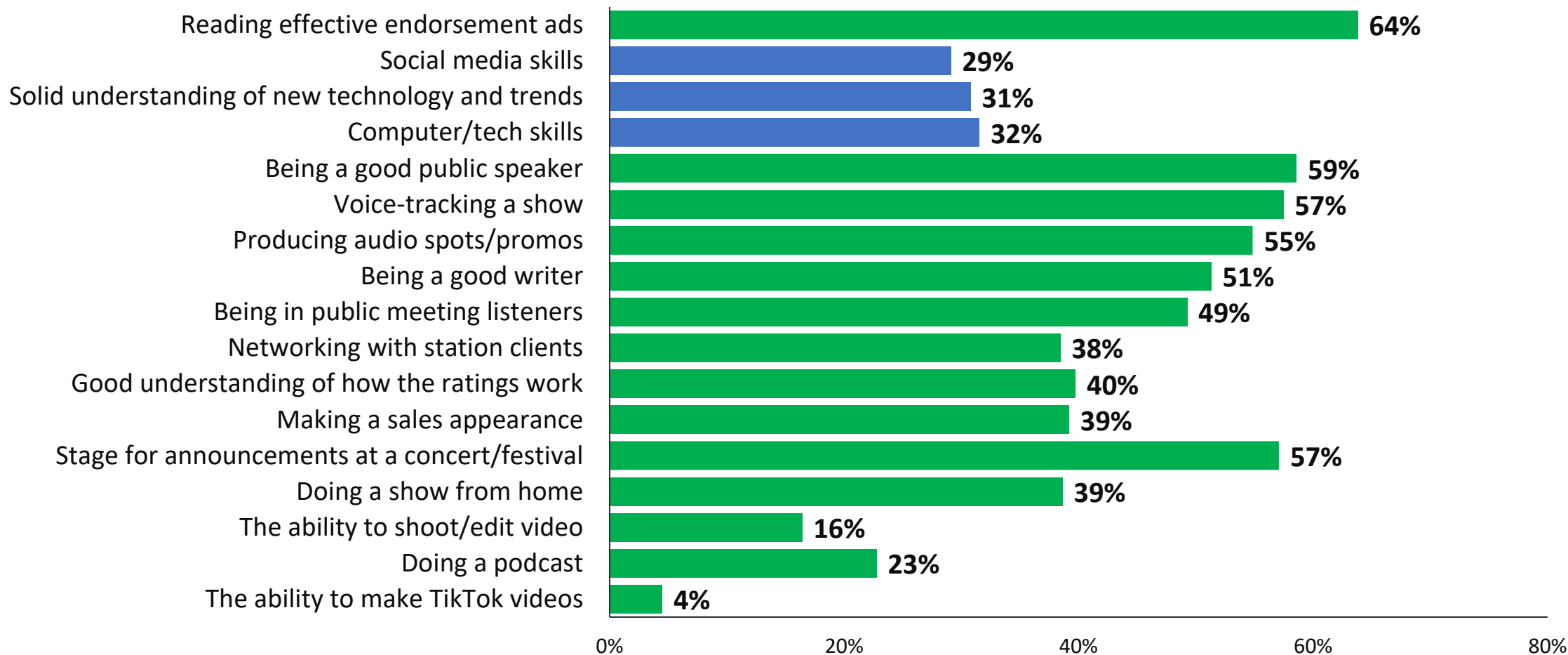


# Self-Rated “Excellent” for Each Skill Needed to Be Successful on the Air



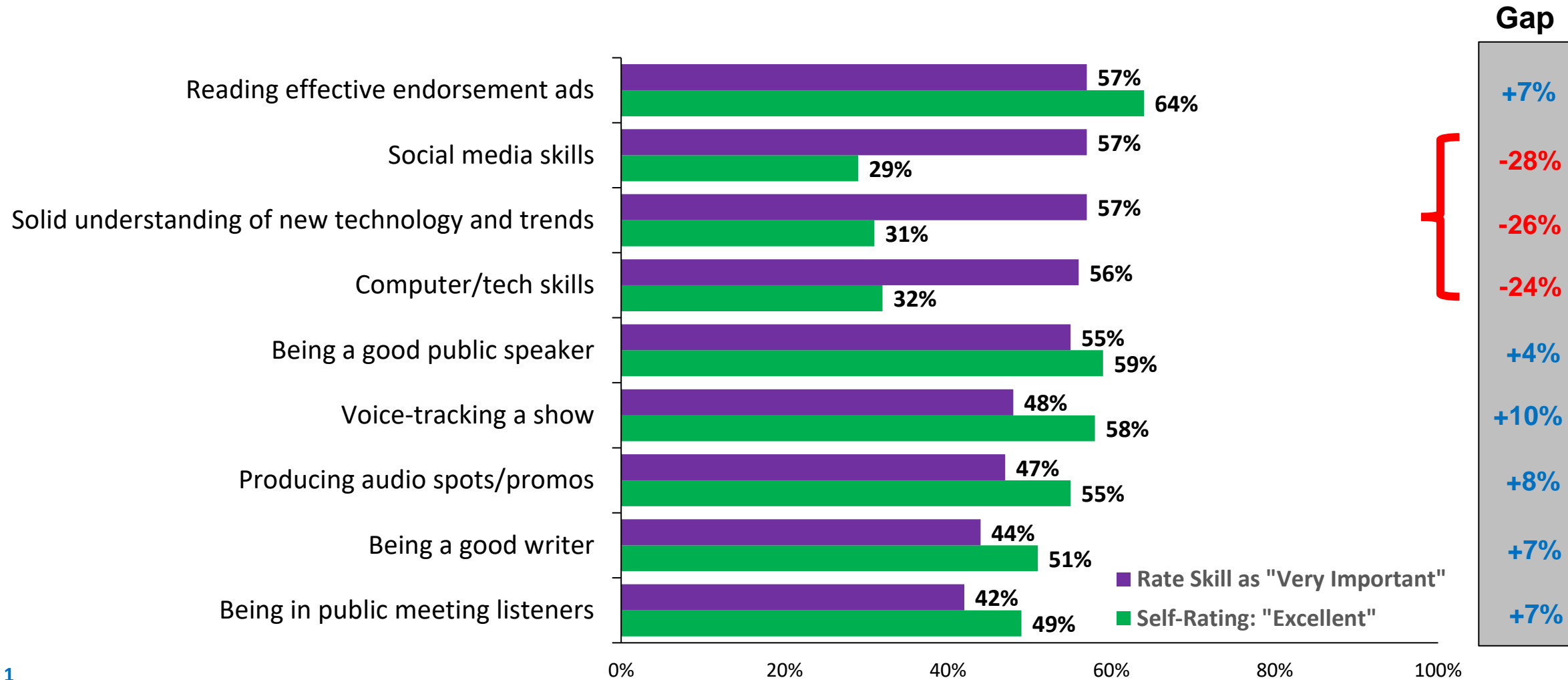
Among On-Air Talent, % who rate themselves as  
“excellent” for each skill/ability  
In order of Total

# Self-Rated “Excellent” for Each Skill Needed to Be Successful on the Air

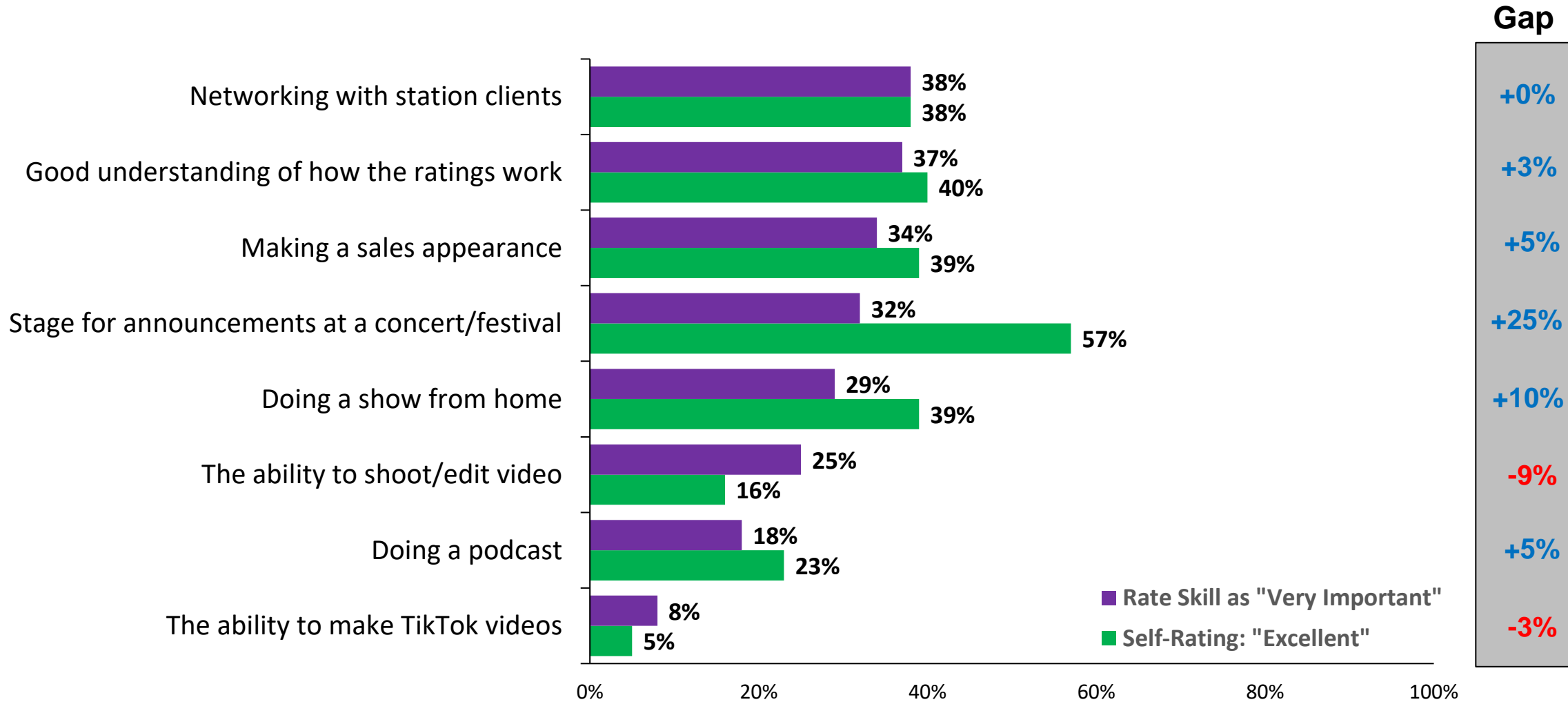


Among On-Air Talent, % who rate themselves as  
“excellent” for each skill/ability  
In order of Total

# Skills for Being Successful on the Air: Importance vs. Self Rating



# Skills for Being Successful on the Air: Importance vs. Self Rating









*“Do you have a ‘radio superpower’ - something you do especially well – whether you’re being asked to do it or not?”*



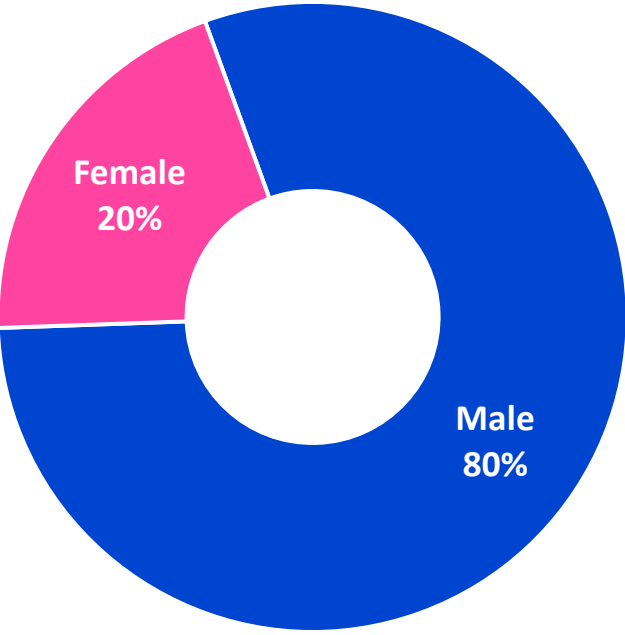




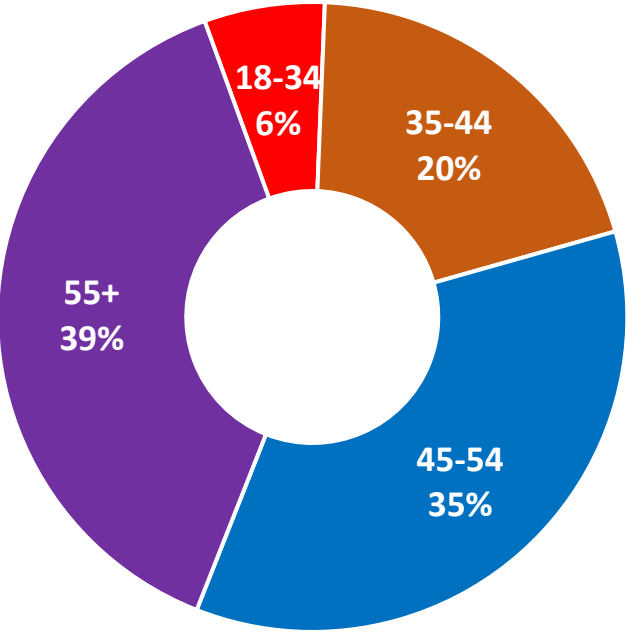


# Who Is on the Beach?

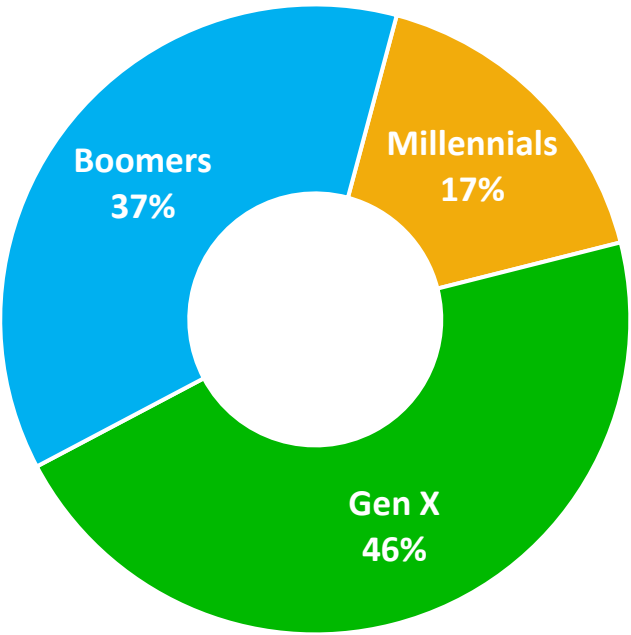
Gender



Age



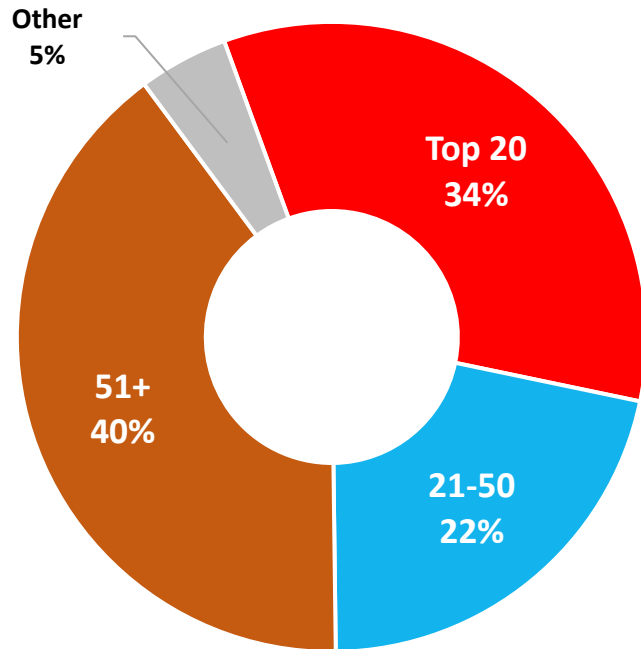
Generation



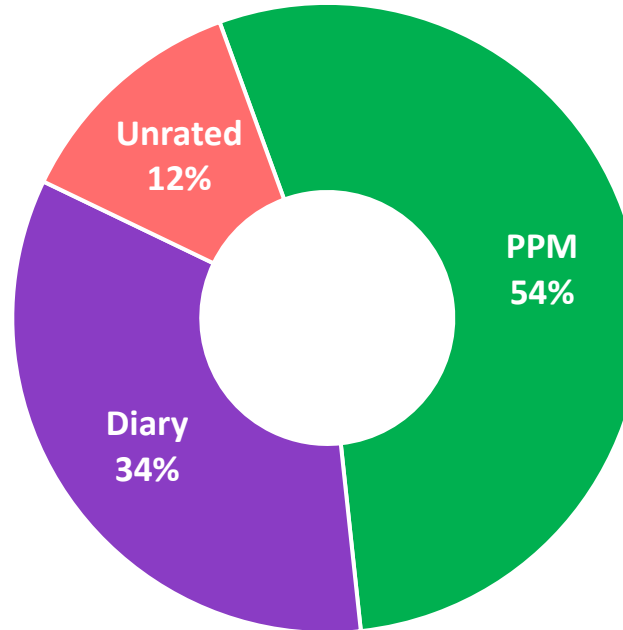
**Average Age: 51.3**  
Among Those Out of Radio

# Who Is on the Beach?

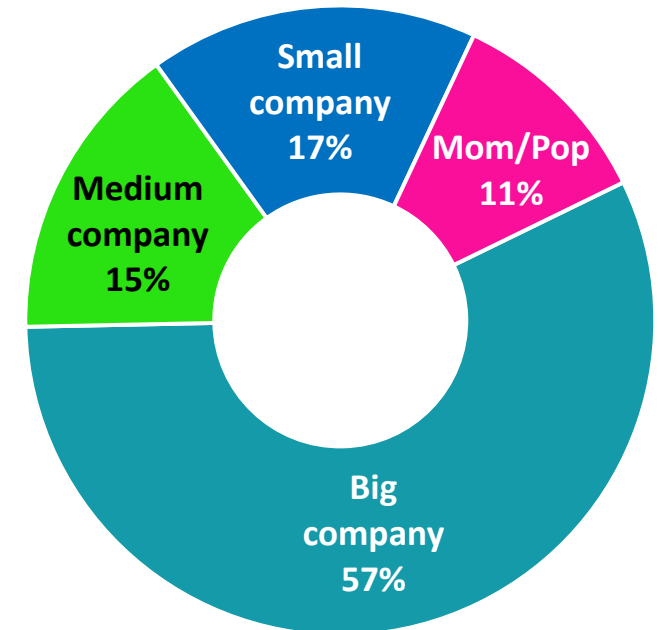
## Market Size



## Ratings Methodology



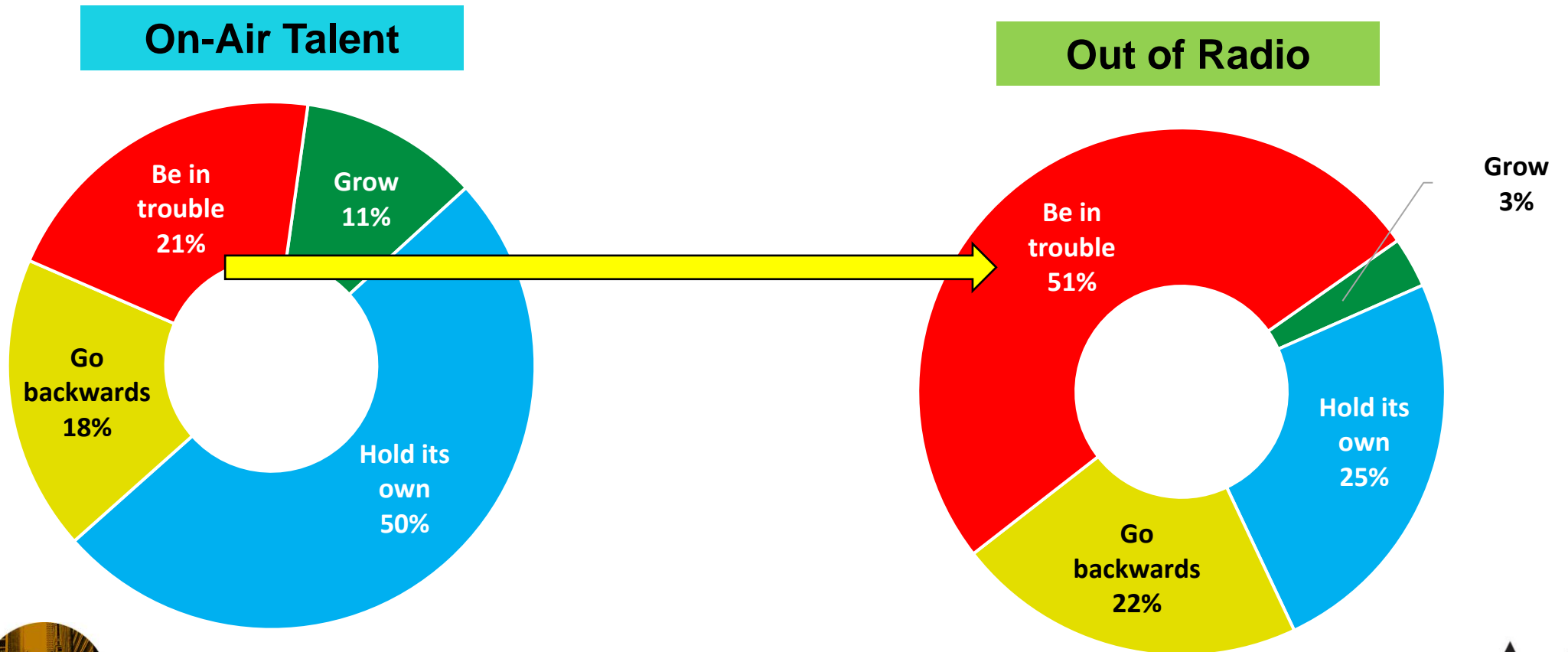
## Ownership





# Those on the Beach Are More Than Twice As Negative About Broadcast Radio's Future

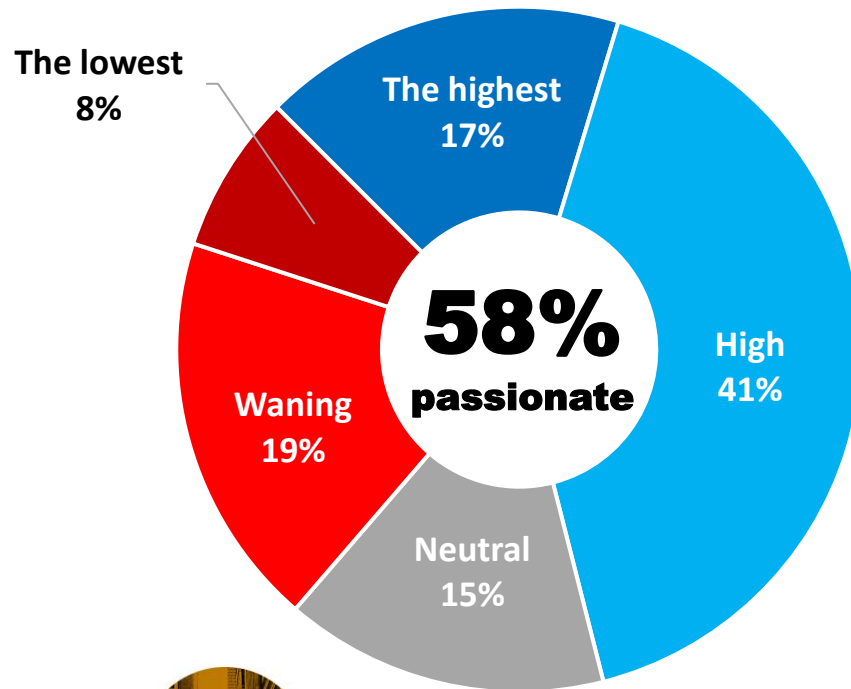
*"In the next 5 years, you think broadcast radio will:"*



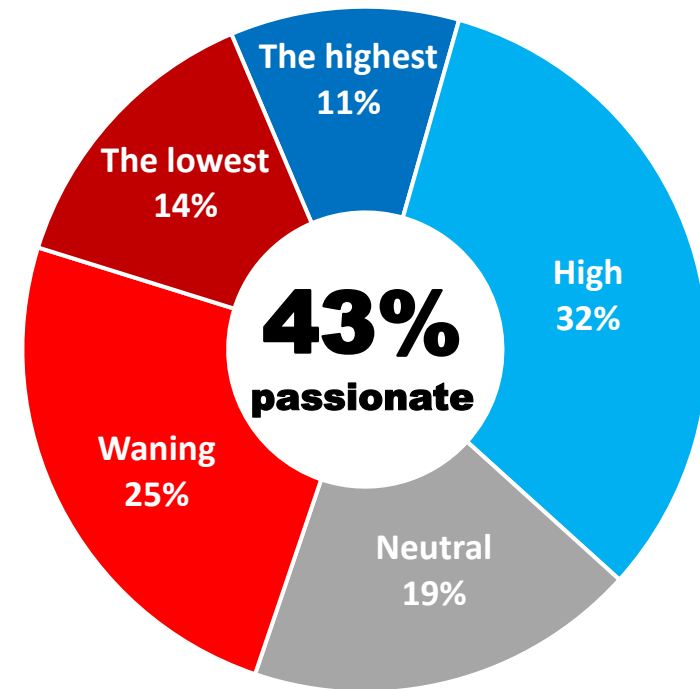
# ...And Their Passion for Radio Is Markedly (and Understandably) Lower

*"Your current passion level for the broadcast radio business is..."*

## On-Air Talent

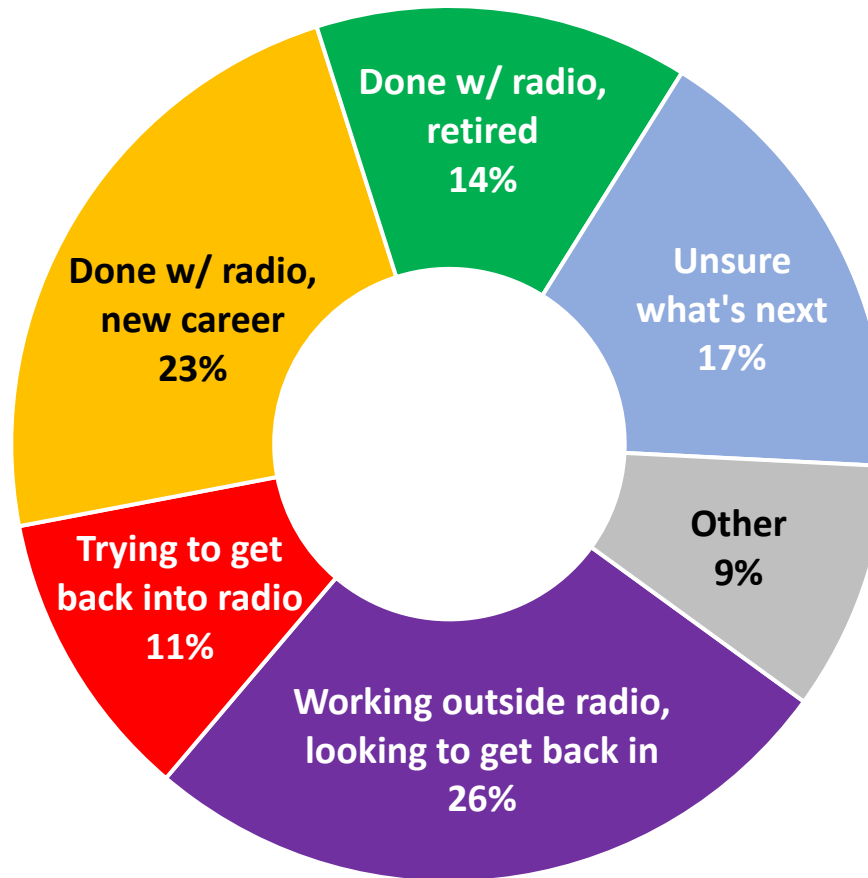


## Out of Radio



# More Than One-Third of Those “on the Beach” Say They’re Done With Radio

*“Which ONE of the following statements best describes your career plan at this point?”*



Among Those Out of Radio

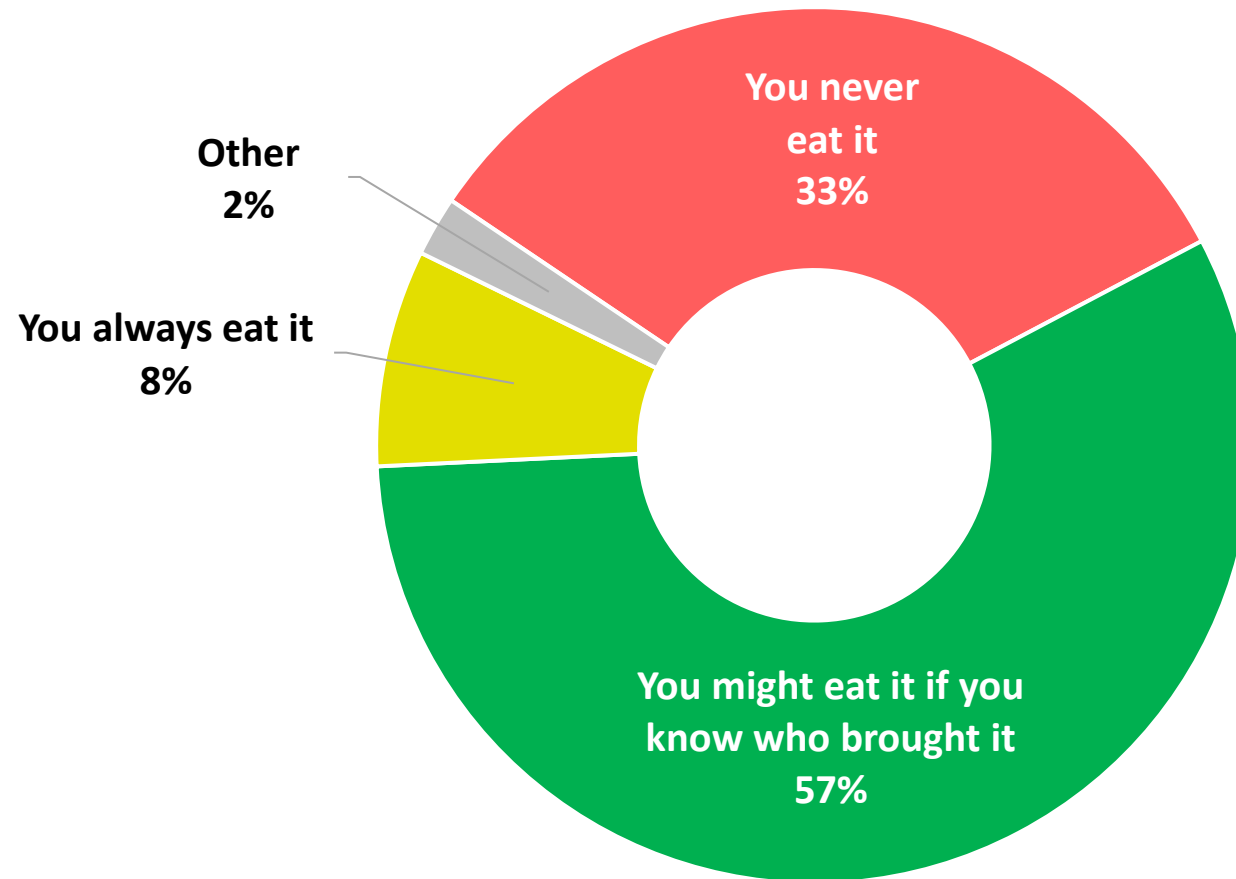






# Most Only Eat “Listener Food” If They Know Who Brought It

*“When it comes to ‘listener food’:”*

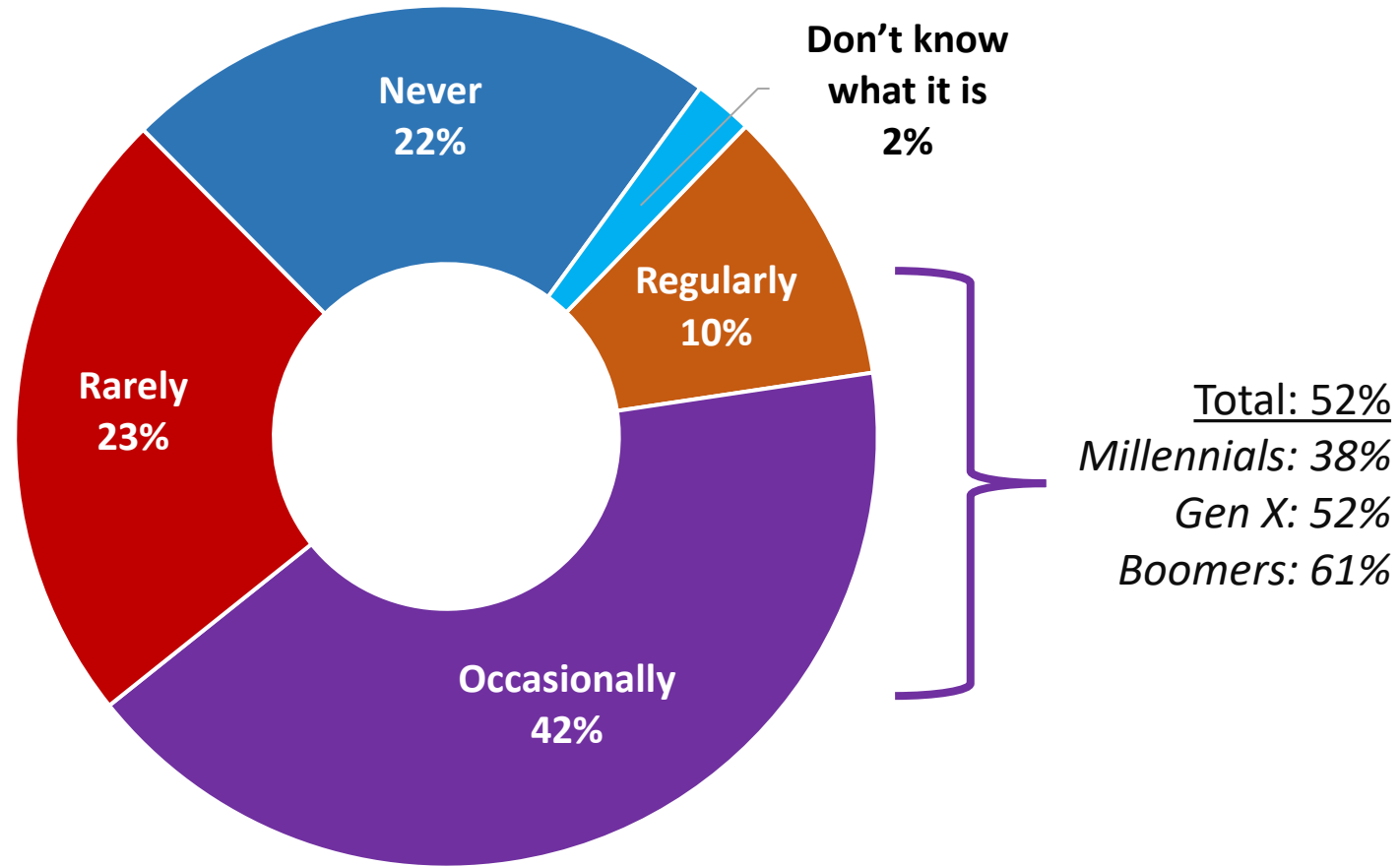


Among On-Air Talent



# More Than Half of Air Talent Has the “Dead Air” Dream at Least Occasionally

*“Do you have the ‘dead air dream’?”*



Among On-Air Talent



# Questions & Observations



# Questions/Observations

- 🎤 It's been the Toughest. Year. Ever. Every personality, host, DJ was "tested."
- 🎤 A majority never worked from home.
- 🎤 How many "hats" can you wear before you stop being effective? Or burn out?
- 🎤 The biggest companies have some work to do – reputationally & otherwise.
- 🎤 And medium/small companies have an opportunity to become THE destination for talent. No one owns "the hill."
- 🎤 If you're talent, find someone you trust to critically aircheck you.
- 🎤 For women on the air, the journey has gotten even more arduous.
- 🎤 Personalities would be wise to save/invest every dime they earn. Compensation isn't growing.
- 🎤 Talent should sharpen up their skills, especially in the tech/social sectors.
- 🎤 Give anyone you know who's "on the beach" a hug. And help them get back in.
- 🎤 Don't EVER eat listener food!

# Thank You!

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